Tourism and Small Business

A STUDY TO DETERMINE THE IMPACT OF EVENTS ON LOCAL ECONOMIES:

EXECUTIVE SUMMARY

March, 1985

Saskatchewan
Tourism and
Small Business

A STUDY TO DETERMINE THE IMPACT OF EVENTS ON LOCAL ECONOMIES:

EXECUTIVE SUMMARY

March, 1985

Prepared by:
Derek Murray Consulting Associates Ltd.

STUDY TO DETERMINE THE IMPACT OF EVENTS
ON LOCAL ECONOMIES

THIS STUDY IS A TECHNICAL WORKING DOCUMENT PREPARED BY CONSULTANTS WHO WERE ENGAGED BY THE GOVERNMENTS OF SASKATCHEWAN AND CANADA TO DETERMINE THE ECONOMIC IMPACT OF EVENTS AT THE COMMUNITY LEVEL AND THE ABILITY OF EVENTS TO ATTRACT VISITORS. IN ITS PRESENT FORM IT REFLECTS THE VIEWS AND OPINIONS OF THE CONSULTANTS AND SHOULD NOT BE INTERPRETED AS DECISIONS REGARDING POLICY OR PROGRAMS ON THE PART OF FEDERAL OR PROVINCIAL GOVERNMENT.

EXECUTIVE SUMMARY

1.0 INTRODUCTION

A Study to Determine the Impact of Events on Local Economies is one of a series of study initiatives undertaken by the Canada/ Saskatchewan Tourism Planning Steering Committee. The principal objective of these study initiatives is the development and implementation of a Saskatchewan Tourism Strategy. The Events Study focusses on an analysis of the role and impact that Saskatchewan events are now or could be playing in stimulating tourism travel and expenditure.

Objectives of the Study

Although Saskatchewan's events have been long thought to have an impact on tourism travel and expenditure, they have never undergone serious investigation as to the impact they are now having or could have. As a result the principal objective of the study is to:

> Determine the economic impact of events at the community level and the ability of events to attract visitors.

In realizing this objective a profile of Saskatchewan's events emerges as to:

- attendance
- market area
- expenditure impact
- visitor profile
- impact on local and provincial economies

In developing this profile, the relationship of events to a Provincial Tourism Strategy can be better understood in terms of their potential for development in realizing the goals of a Tourism Strategy.

2.0 APPROACH

One of the biggest obstacles in studying the tourism potential of Saskatchewan events is the lack of an accurate data base -- how many events are there and what is their attendance? Further, if that information is available what is the proportion of local to non-local and out-of-province visitors, what expenditure does this create for a local community and does it result in hotel utilization, shopping and restaurant expenditure? What are the attitudes of visitors to the events themselves -- will they return and what improvements are required?

Given these data and information requirements both a "desk" research program and field survey were undertaken. About 200 events were identified in Saskatchewan. The attendance, location and theme or type were determined through utilization of the Province's calendar of events and phone interviews with the host communities and events organizers themselves. From this profile a total of 26 events were selected for our field interview survey. Over 3,500 on-site face-to-face interviews were completed during the course of the year. The events organizers were very supportive of our field interview program. These interviews yielded invaluable information regarding existing market areas of events, the resulting tourism expenditure and visitor impressions.

The resulting data and information was then computerized to yield a market and economic impact statement for Saskatchewan events. Coupled with an interview program with events organizers and community leaders, conclusions then emerged as to the impact and role events could play in a Saskatchewan Tourism Strategy.

Our rationale for selecting these 26 events was based on the following factors:

- The sample should be reflective of event categories (i.e. festivals, sports, rodeo, themed/cultural events, arts/crafts, native events.
- Sampling should be regional, through the province and reflective of large and small communities.
- The sample should be biased in favour of larger events or events thought to have some tourism impact but not without some sampling of smaller events or events held in small communities.
- Sampling should be carried out throughout the year over all four seasons.
- There should be comparative events to allow for an analysis of two or more communities hosting similar events.
- Events should be selected that will allow for proper or accurate interviewing.
- Similar events held at different times of the year should be selected to assess if seasonality is a factor.

3.0 PROFILE OF SASKATCHEWAN EVENTS

As illustrated in Figure 1.0, Saskatchewan has almost 200 events attended by over 1.5 million people annually. The events generally fall into eight broad types or categories:

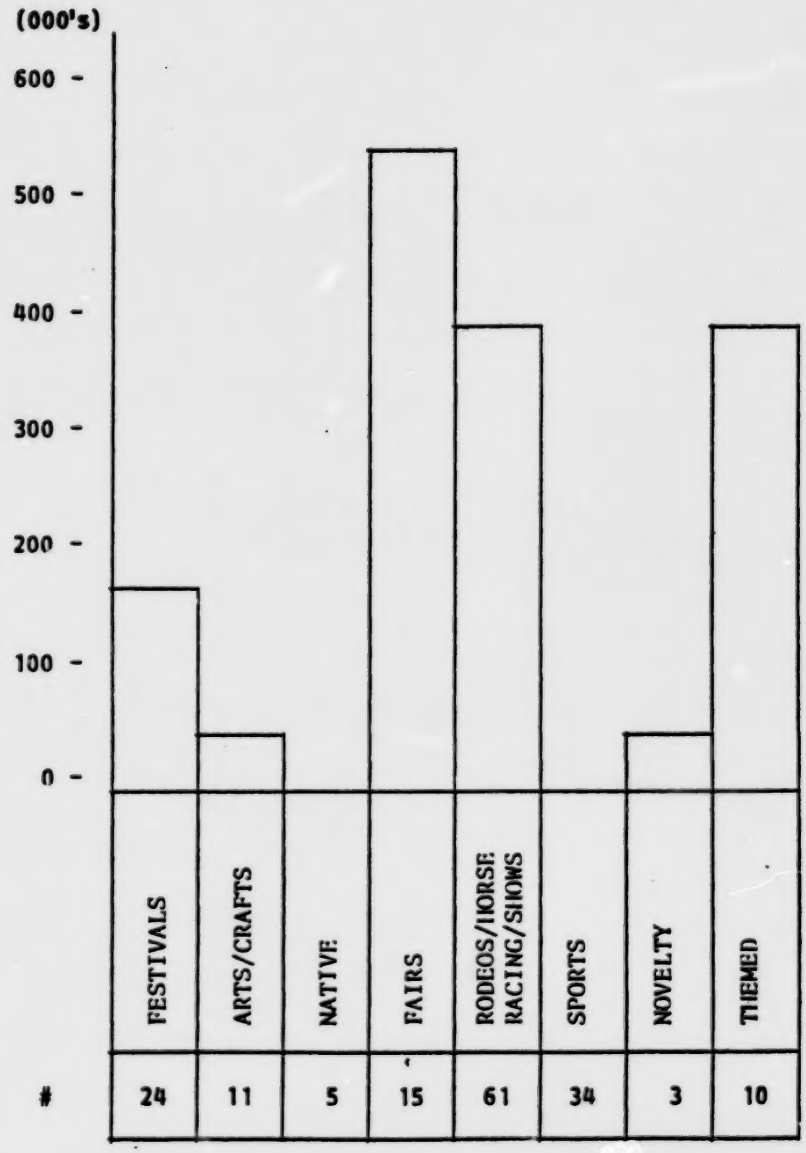
- Festivals
- Arts and Crafts Events
- Native Events
- Fairs
- Rodeos and Horse Racing/Shows
- Sports Events
- Novelty Events
- Themed Events

The vast majority of Saskatchewan events could be characterized as small local events with an average attendance of 9,723 people. Festivals, of which there are twenty-five, are largely characterized by ethnic festivals such as Mosaic (Regina) and Folkfest (Saskatoon) which both attract 30,000 visitors. Events of this nature held in Manitoba such as Folklorama have an attendance in excess of 70,000 people and are becoming increasingly popular. The largest music festival in Saskatchewan is Bosco Home's Big Valley Jamboree, a relatively new event, but a highly successful event that attracted 50,000 people.

Arts/crafts, Native and novelty events in Saskatchewan are not that numerous and the development of these events has been modest. Saskatchewan's largest handcraft event is the Saskatchewan Handcrafts Show/Sale held annually at Battleford and attracts upwards of 22,000 visitors. There has been virtually no development of Native events in Saskatchewan. Unlike Manitoba, there has been little development of novelty events such as Frog Follies and Turtle Derbies attracting more than 20,000 visitors to smaller Manitoba communities. In Saskatchewan events such as Wynyard's Chicken Chariot Races are still largely local events.

FIGURE 1.0

Types of Saskatchewan Events
1983



Total Number of Events* = 163
Total Attendance = 1,584,870

* Only those events for which attendance could be determined.

The sports events contained within our survey are really not that characteristic of Saskatchewan sports as they do not include competitively programmed sporting events such as the Saskatchewan Roughriders. Our events included skiing, figure skating, curling and other community hosted events.

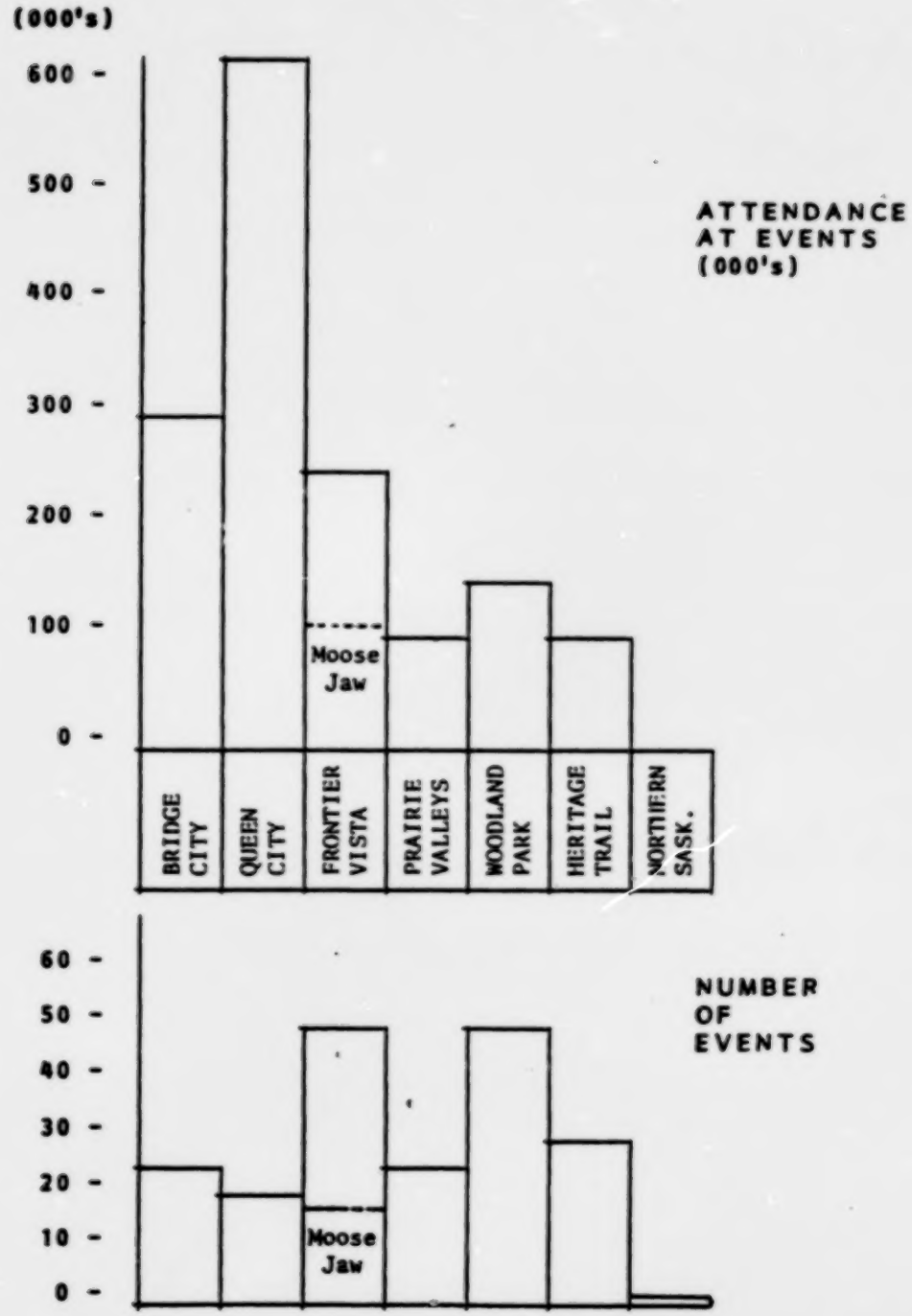
Fairs are still one of the most historically popular Saskatchewan events, with some being over 70 years of age. The largest is Regina's Buffalo Days attracting 240,000 visitors. By far the most popular event in Saskatchewan are rodeos. However there are only a few rodeos attracting significant visitation such as Bosco Home's Big Valley Rodeo/Stampede (30,000 - 40,000 visitors) and the Agribition indoor rodeo (25,000 visitors).

Lastly, themed events include some relatively large events such as the Canadian Western Agribition (150,000 people), Saskatoon Mexabition and Western Farm Progress Show, both attracting 30,000 or more visitors. In previous year's Moose Jaw's Air Show/Fair has attracted upwards to 100,000 people.

Figure 2.0 presents a comparative graphic of all Saskatchewan events on the basis of defined travel regions or destinations. Based on an analysis of attendance at all Saskatchewan events, the City of Regina has had the greatest success in attracting visitors to its events. In comparison to Regina it appears that Saskatoon has done relatively little to develop events as it has slightly more annual events than Regina but receives less than half the visitation of Regina's events. Moose Jaw appears to have performed well in events development in comparison to larger centres.

FIGURE 2.0

Number and Attendance of Saskatchewan Annual Events by Region



4.0 SASKATCHEWAN EVENTS FIELD SURVEY

Table 1.0 indicates the events that were sampled in our field survey from the fall of 1983 to the summer of 1984. An on-site survey questionnaire involving 4,000 interviews was implemented to collect the following data:

- Origin of Attendance at Event
  - Host Community
  - Saskatchewan
  - Canada
  - U.S.A.
  - International
- Travel Characteristics
  - Mode of Travel
  - Number of People in Party
  - Accommodation Required
  - Travel Expenditure
  - Length of Stay
- Event Characteristics
  - Reason for Attending (the event itself or other)
  - Repeat/First Time Attendance
  - Visitor Impressions of Event/Facilities
  - Expenditure at Event

TABLE 1.0

Sample Selection of Saskatchewan Events

Event Category	Location	Estimated Attendance	Number of Events Interviews	Number of Events Surveyed	Season			
					Sum.	Fall	Win.	Spr.
Festivals								
* Big Valley Jamboree	Craven	50,000	207		1			
Folkfest	Saskatoon	25,000	300				1	
Mosaic	Regina	25,000	42					1
Moose Jaw Bandfest	Moose Jaw	26,000	33					1
Optimist Bandfest	Regina	4,000	54					1
Yorkton Filmfest	Yorkton	100	27			1		
Total		130,100	663	6				
Rodeos								
Big Valley (Fall '83)	Craven	40,000	262			1		
* Big Valley (Spr. '84)	Craven	25,000	61					1
Humboldt (Indoor)	Humboldt	6,000	22			1		
* Regina Horse Show	Regina	10,000	50					1
Total		81,000	395	4				
Sports								
* Yorkton Hockey Tourn.	Yorkton	15,000	42				1	
* S. C. Hockey Tourn.	Swift Current	14,000	135				1	
* National Figure Skating	Regina	20,000	103				1	
Sask. 60	Duck Lake	900	15				1	
* P. A. Mixed Curling	Prince Albert	1,000	92				1	
Total		50,900	387	5				
Themed								
Agribition	Regina	150,000	596			1		
Wstrn. Farm Prog. Show	Regina	40,000	151		1			
Mexabition	Saskatoon	50,000	478		1			
Moose Jaw Air Show	Moose Jaw	30,000	400		1			
Total		270,000	1,625	4				
Arts/Crafts								
Sundog	Saskatoon	8,000	30			1		
Bazart	Regina	10,000	48		1			
Sask. Handcraft Festival	N. Battleford	22,000	64		1			
Total		40,000	142	3				
Fairs								
Buffalo Days	Regina	240,000	200	1	1			
Novelty (Other)								
Those Were The Days	N. Battleford	2,600	71		1			
Heritage Bus Tours	Saskatoon	690	7		1			
Total		3,290	78	2				
Native								
Fort Qu'Appelle Pow-Wow	Standing Buffalo I.R.	1,000	25	1	1			
TOTALS		816,290	3,335	26	10	5	6	5

* Events not identified in the Appendix.

5.0 MARKET CHARACTERISTICS FOR SASKATCHEWAN EVENTS

Market Area

As we were most interested in the tourism impact resulting from the sampled events the surveys sought to determine attendance from those persons travelling 50 miles or greater (the conventionally accepted definition of tourism travel) to attend the event from Saskatchewan and out-of-province destinations.

Table 2.0 indicates that, on average, the events surveyed were clearly not local events with only local and regional appeal. Only 38.1% of the attendance was drawn from the host community. There were some exceptions to this such as the province's two largest cultural festivals, Mosaic and Folkfest, which, at this point, would be characterized as local events relying on the local market for over 75% of their attendance (76.9% in the case of Folkfest and 90.5% in the case of Mosaic). Two of the arts/crafts events surveyed, Bazart and Sundog, were also largely local events with 86.0% and 79.2% of their attendance, respectively, being local. In other cases events such as the Western Farm Progress Show, Agribition, Swift Current Midget Hockey Tournament and Big Valley Jamboree were having considerable tourism travel impact with 60% - 80% of the attendance being drawn from the tourism travel markets. In general, themed events had the greatest tourism impact.

As to the location of those tourism markets almost 74% were drawn from Saskatchewan travel markets. The largest out-of-province market was the province of Alberta, accounting for 10.3% of tourism travel to all events. Sporting events, in particular the two hockey tournaments surveyed and the National Figure Skating Finals, achieved the greatest impact on out-of-province tourism travel.

TABLE 2.0

Local, Regional and Tourism Markets

Events	Attendance	Sample	Local and Regional Market						Tourism Market			
					Regional Attendance				Tourism Attendance			
			Total Local Attendance		0-15 Miles	15-50 Miles	Total Reg. Attendance		50-150 Miles	>150 Miles	Total Tourism Attendance	
		#	#	%	#	#	#	%	#	#	#	%
Festivals												
Big Valley Jamboree	50,000	207	35	16.9	0	41	41	19.8	56	75	131	63.3
Folkfest	25,000	300	230	76.7	3	12	15	5.0	18	37	55	18.3
Mosaic	25,000	42	38	90.5	0	2	2	4.8	1	1	2	4.8
Moose Jaw Bandfest	26,000	33	16	48.5	0	12	12	36.4	1	4	5	15.2
Optimist Bandfest	4,000	54	21	38.9	2	4	6	11.1	21	6	27	50.0
Yorkton Filmfest	100	27	9	33.3	0	0	0	0.0	11	7	18	66.7
Total	130,100	663	349	52.6	5	71	76	11.5	108	130	238	35.9
Rodeos												
Big Valley (Fall '83)	40,000	262	12	4.6	40	79	118	45.0	67	65	132	50.4
Big Valley (Spring '84)	25,000	61	37	60.7	0	4	4	6.6	12	8	21	32.8
Humboldt (Indoor)	6,000	22	11	50.0	2	3	5	22.7	4	2	67	27.3
Regina Horse Show	10,000	50	23	46.0	0	6	6	12.0	6	15	21	42.0
Total	81,000	395	83	21.0	42	92	133	33.7	89	90	179	45.3
Sports												
Yorkton Hockey Tourn.	15,000	42	32	76.2	0	0	0	0.0	2	8	10	23.8
S. C. Hockey Tourn.	14,000	135	45	33.3	1	5	6	4.4	13	71	84	62.2
Skate Canada	20,000	103	40	38.8	0	6	6	5.8	20	37	57	55.3
Sask. '60	900	15	6	40.5	0	3	3	20.0	2	4	6	40.0
P. A. Mixed Curling	1,000	92	63	68.5	1	5	6	6.5	2	21	23	25.0
Total	50,900	387	186	48.1	2	19	21	5.4	39	141	180	46.5
Themed												
Agribition	150,000	596	133	22.3	5	80	5	14.3	189	189	378	63.4
Wstrn. Farm Prog. Show	40,000	151	11	7.3	3	17	0	13.2	61	99	120	79.5
Mexibition	50,000	478	152	31.8	16	99	5	24.1	167	38	205	42.9
Moose Jaw Air Show	30,000	400	184	46.0	3	34	7	9.3	78	101	179	44.8
Total	270,000	1,625	480	29.5	27	230	17	15.8	495	387	882	54.3
Arts/Crafts												
Sundog	8.000	50	43	86.0	1	1	2	4.0	3	2	5	10.0
Bazart	10,000	48	38	79.2	1	1	2	4.2	2	6	8	16.7
Sask. Handcraft Fest.	22,000	64	13	20.3	0	6	6	9.4	28	17	45	70.0
Total	40,000	162	94	58.0	2	8	10	6.2	33	25	58	35.8
Fairs												
Buffalo Days	240,000	200	115	57.5	1	23	24	12.0	31	30	61	30.5
Novelty (Other)												
Those Were The Days	2,600	71	32	45.1	0	6	6	8.5	11	22	33	46.4
Heritage Bus Tours	690	7	3	42.9	0	0	0	0.0	0	4	4	57.2
Total	3,290	78	35	44.9	0	6	6	7.7	11	26	37	47.4
Native												
Fort Qu'Appelle Pow-Wow	1,000	25	4	16.0	1	1	2	8.0	13	16	19	76.0
TOTALS	816,290	3,535	1,346	38.1	80	549	529	15.0	809	846	1,657	46.9

Visitor Characteristics

Saskatchewan events were shown to be family oriented as almost 60% of the people attending the events did so with family members. Even events such as the Western Farm Progress Show and Agribition were regarded as family events.

Market Support and Visitor Impressions

Generally persons attending these events were satisfied with their experience at the events as over 90% would return again and 85% would encourage others to do so. However both event, facility and service improvements are required as 45% of the people surveyed felt improvements were necessary. In eight of the 26 events surveyed over 50% of the people interviewed felt improvements were required at the event in terms of expanding the event, improving its facilities and services. These events were the three Big Valley events organized by Bosco Homes, Folkfest, Mosaic, the Western Farm Progress Show, Sundog and the Moose Jaw Air Show.

6.0 ECONOMIC IMPACT

Tourism Expenditure

Table 3.0 indicates that the total tourism expenditures resulting from persons travelling more than 50 miles to attend the events was $68.2 million. The average per person expenditure was $175.87. An important observation from this table is that for every $24.72 events receive from tourists the community receives $151.75. This is an important point that should effectively demonstrate that communities should be very supportive of events.

Sporting events emerged as having the highest average trip expenditure at $344.09 with the Prince Albert Mixed Curling Finals leading the way at an average trip expenditure of $568.21. However, in regard to total tourism expenditure, the City of Regina's Agribition and Buffalo Days were the largest events generating $19.6 million and $17.2 million in tourism expenditure, respectively. Only six events, in addition to Agribition and Buffalo Days, exceeded $2.0 million in tourism expenditure.

	Attendance	Average Spend	Total Tourism Expenditure
National Figure Skating Finals	20,000	$397.25	$4,393,437
Western Farm Progress Show	40,000	139.52	4,436,842
Big Valley Jamboree	50,000	131.48	4,176,982
Swift Current Hockey Tourn.	14,000	302.01	2,629,878
Big Valley (Fall '83)	40,000	107.89	2,175,134
Mexabition	50,000	114.82	2,432,852

TABLE 3.0

Tourism Expenditure Impact Resulting from Events

Event Category	Estimated Attendance At Event	% That Are Tourists	Average Per Person Travel Expenditure	Total Travel Expenditure	Avg. Per Tourist Expenditure at Event	Total Tourism Expenditure at Event	Avg. Per Tourist Expenditure	Total Tourism Expenditure
Festivals								
Big Valley Jamboree	50,000	63.3	86.11	$ 2,725,282.44	$ 45.87	$1,451,699.05	$131.98	$ 4,176,981.49
Folkfest	25,000	18.3	183.19	838,056.82	47.86	218,954.13	231.05	1,057,011.95
Mosaic	25,000	4.8	168.75	202,500.00	34.12	40,940.77	202.87	243,440.77
Moose Jaw Bandfest	26,000	15.2	283.00	1,118,416.00	10.17	40,178.67	293.17	1,158,594.67
Optimist Bandfest	4,000	50.0	68.65	137,307.69	19.87	39,731.63	88.52	177,039.39
Yorkton Filmfest	100	66.7	202.49	13,506.75	18.23	1,216.13	220.72	14,722.88
Total	130,100	35.9	114.43	5,035,069.70	28.74	168,313.36	143.17	5,203,383.06
Rodeos								
Big Valley (Fall '83)	40,000	50.4	76.17	1,535,672.73	31.72	639,461.44	107.89	2,175,134.17
Big Valley (Spr. '84)	25,000	32.8	107.50	881,500.00	28.82	236,442.95	136.23	1,117,943.96
Humboldt (Indoor)	6,000	27.3	17.50	28,665.00	11.92	19,530.00	29.42	48,195.00
Regina Horse Show	10,000	42.0	320.23	1,345,000.00	27.75	116,545.47	347.98	1,461,545.47
Total	81,000	45.3	110.86	3,790,837.73	29.59	1,059,414.23	140.45	4,850,251.96
Sports								
Yorkton Hockey Tourn.	15,000	23.8	267.92	956,462.50	20.68	73,828.57	288.60	1,030,291.10
S. C. Hockey Tourn.	14,000	62.2	273.96	2,385,629.17	28.05	244,240.06	302.01	2,629,878.23
National Figure Skating	20,000	55.3	350.23	3,873,425.44	47.02	520,011.71	397.25	4,393,437.15
Sask. 60	900	40.0	42.50	15,300.00	14.78	5,320.00	57.28	20,620.00
P. A. Mixed Curling	1,000	25.0	518.48	129,619.57	49.73	12,432.07	568.21	142,051.64
Total	50,900	46.5	307.35	7,360,436.67	36.74	793,412.00	344.09	8,153,848.67
Themed								
Agribition	150,000	63.4	180.42	17,157,625.00	26.63	2,532,697.43	207.05	19,690,322.43
Wstrn. Fare Prog. Show	40,000	79.5	117.58	3,739,150.00	21.94	697,692.00	139.52	4,436,842.00
Mexabition	50,000	42.9	100.86	2,163,572.56	12.55	269,278.92	114.82	2,432,851.48
Moose Jaw Air Show	30,000	44.8	92.29	1,240,460.87	13.96	187,622.40	106.25	1,428,083.27
Total	270,000	54.3	150.19	24,300,808.43	19.13	3,019,023.15	169.32	27,319,831.58
Arts/Crafts								
Sundog	8,000	10.0	65.50	52,400.00	17.04	13,631.45	82.54	66,031.45
Bazart	10,000	16.7	240.94	402,365.63	23.39	39,388.77	264.53	441,754.40
Sask. Handcraft Festival	22,000	70.0	66.22	1,019,822.22	30.40	468,176.59	96.62	1,487,998.81
Total	40,000	35.8	82.52	1,474,587.85	24.63	372,677.64	106.15	1,847,265.68
Fairs								
Buffalo Days	240,000	30.5	209.50	15,336,000.00	26.63	1,949,663.68	236.13	17,285,663.68
Novelty (Other)								
Those Were The Days	2,600	46.4	59.70	72,018.42	4.23	5,100.93	63.93	77,119.35
Heritage Bus Tours	690	57.2	490.63	193,639.88	3.14	1,240.42	493.77	194,880.30
Total	3,290	47.4	165.93	265,658.30	4.16	6,238.76	170.09	271,897.06
Native								
Fort Qu'Appelle Pow-Wow	1,000	76.0	176.30	134,000.00	12.11	9,202.53	188.41	143,202.53
TOTALS	816,290	46.9	151.15	57,864,191.87	24.72	10,369,966.43	175.87	68,234,158.20

Economic Impact

The tourism expenditure associated with the 26 events surveyed would have accounted for 6.8% of Saskatchewan's total tourism expenditure and 4.8% of total tourism travel in Saskatchewan. Although our sample represents roughly half of the total attendance at all Saskatchewan events it includes some of the major events held in Saskatchewan which have significant tourism travel associated with them. It does not include many of the Province's smaller events that are purely of local and regional significance and not likely to have much in the way of tourism travel associated with them. Without a registry of Saskatchewan events, it is impossible to have a complete inventory of events held annually or otherwise. Although our sample does contain a number of the Province's larger events, we still feel it is reasonably reflective of all events held in Saskatchewan. A small event can conceivably attract the same percentage of tourists as do large events. In some cases large events such as Mosaic and Folkfest have attracted few tourists.

Given this, we feel that our sample is representative of the total tourism expenditure impact that Saskatchewan events have on the Province's tourism economy. The total attendance identified for all Saskatchewan events is estimated to be 1.7 million people. This figure includes the attendance of 7 events contained within our sample but not within the provincial calendar of events. If we assume that of this total attendance 46.9% of the people are tourists and on average their per person expenditure is $175.87, then the total tourism impact associated with all Saskatchewan events is $140.2 million or 14% of total tourism expenditure in Saskatchewan.

Lastly, we have also determined the direct employment impact resulting from Saskatchewan events. The employment estimates were derived from

applying an estimated employment ratio of 33.8 person years of direct employment resulting from $1.25 million in tourism expenditure.* The total employment impact from all events would be 3,791 or 14% of Saskatchewan's total tourism employment.

Given the data and information developed, Saskatchewan events are making a significant contribution to Saskatchewan tourism. Most importantly they positively impact on a structural problem in the Saskatchewan industry, which is the low trip expenditure resulting from Saskatchewan travel markets. Trip expenditure in Saskatchewan is the lowest in Western Canada and 25% lower than the average for Canadian trip expenditure.

---

* Source: Saskatchewan Tourism Strategy, prepared for the Governments of Saskatchewan and Canada by Derek Murray Consulting Associates, Marshall Macklin Monaghan and Thorne Stevenson Kellogg.

7.0 CONCLUSIONS

Concerning the realization of the study's principal objective "to determine the economic impact of events at the community level and the ability of events to attract visitors", the results of our analysis have determined and desribed the economic impact of Saskatchewan events and has shown it to be considerable. Of the 26 events surveyed, on average 46.9% of their attendance was drawn from tourism markets. The estimated tourism expenditure impact for all Saskatchewan events was estimated to be $140 million or 14% of total tourism expenditure in Saskatchewan. The following table provides a comparison between Saskatchewan and events' tourism travel markets and expenditure impact:

Comparison Between Saskatchewan and Events' Tourism Markets and Expenditure Impacts

	Tourism Travel Characteristics	
	Saskatchewan	Events
. Origin of Tourism Visitation		
Saskatchewan Residents	76.8%	73.9%
Canadians	16.8%	21.7%
U.S.A.	6.0%	3.0%
International	.4%	1.5%
. Per Trip Expenditure	$ 103.90	$ 175.87
. Total Tourism Expenditure	1 Billion	140 Million
. Tourism Employment	27,000	3,791

In relationship to a Saskatchewan Tourism Strategy events could play an important role. The three principal objectives for Saskatchewan's Tourism Strategy are:

1. Increase the level of trip expenditure made in Saskatchewan.
2. Increase Saskatchewan's share of non-residential travel.
3. Improve Saskatchewan's image as a destination for business and pleasure travel.

At present events largely impact on the first objective. Expenditure associated with events is almost double the level of trip expenditure for Saskatchewan tourism travel. The reason for this is that the events themselves are motivators for destination travel in Saskatchewan resulting in extended stays in Saskatchewan communities and greater tourism travel expenditure. Regarding the second objective events have not really resulted in increasing Saskatchewan's share of non-resident or out-of-province travel. They attract only slightly more out-of-province travel than does the Saskatchewan industry itself. Regarding the last objective, events are having some impact on improving Saskatchewan's image as a destination for business and pleasure travel. However this was largely confined to sporting events where Saskatchewan was seen to have an excellent reputation as a "hosting" province. Sports events had the greatest impact on out-of-province travel markets. However, in general, their has been little development of linkages between events and attractions to improve Saskatchewan's destination image -- (i.e. it is the event and not the province or community that is the destination). Events have not been integrated with community tourism development and marketing.

On the basis of our analysis, we have recommended that the development of events be considerably elevated within the Province's tourism industry. This would come in the form of program support from senior and local governments designed to assist in their further development, through facility improvements, and, in particular, product and market development that would have much greater impact on out-of-province markets.

Strategically, we have suggested directions for the future development of events at both the provincial and community levels. Provincially we have attempted to identify those events that should be priorized for development. Locally we have made recommendations as to how the development of events would be more effectively integrated with local tourism planning and the development of greater tourism impact potential for Saskatchewan communities. Many Saskatchewan communities are already benefiting significantly from events. On average, for every $1 events organizers receive, $6 in tourism expenditure is spent in the local community. Clearly support by local communities for events has a strong economic rationale.

A STUDY TO DETERMINE THE IMPACT OF EVENTS ON LOCAL ECONOMIES

March, 1986

Saskatchewan
Tourism and
Small Business

A STUDY TO DETERMINE THE IMPACT OF EVENTS ON LOCAL ECONOMIES

March, 1985

Prepared by:
Derek Murray Consulting Associates Ltd.

STUDY TO DETERMINE THE IMPACT OF EVENTS
ON LOCAL ECONOMIES

THIS STUDY IS A TECHNICAL WORKING DOCUMENT PREPARED BY CONSULTANTS WHO WERE ENGAGED BY THE GOVERNMENTS OF SASKATCHEWAN AND CANADA TO DETERMINE THE ECONOMIC IMPACT OF EVENTS AT THE COMMUNITY LEVEL AND THE ABILITY OF EVENTS TO ATTRACT VISITORS. IN ITS PRESENT FORM IT REFLECTS THE VIEWS AND OPINIONS OF THE CONSULTANTS AND SHOULD NOT BE INTERPRETED AS DECISIONS REGARDING POLICY OR PROGRAMS ON THE PART OF FEDERAL OR PROVINCIAL GOVERNMENT.

TABLE OF CONTENTS

Subject		Page No.
EXECUTIVE SUMMARY		i
1.0	INTRODUCTION	1
	1.1 Objectives for the Study	1
	1.2 Approach	3
2.0	DESCRIPTIVE PROFILE OF SASKATCHEWAN EVENTS	6
	2.1 Introduction	6
	2.2 Festivals	9
	2.3 Art/Crafts	9
	2.4 Native Events	10
	2.5 Fairs	10
	2.6 Rodeos, Horse Racing/Shows	10
	2.7 Sports Events	11
	2.8 Novelty Events	11
	2.9 Themed Events	12
3.0	CHARACTERISTICS AND SIGNIFICANCE OF SASKATCHEWAN EVENTS	13
	3.1 Number, Attendance and Seasonality	13
	3.2 Regional Nature of Events	15
	3.3 Significance of Events	18
4.0	SAMPLE SELECTION AND FIELD SURVEY	20
	4.1 Sample Selection	20
	4.2 Description of Events Contained in the Field Survey	24
5.0	MARKET CHARACTERISTICS FOR SASKATCHEWAN EVENTS	33
	5.1 Catchment Area for Events	33
	5.2 Visitor Characteristics	39
	5.3 Market Support and Visitor Impressions	43
	5.4 Conclusions	47

TABLE OF CONTENTS (Continued)

Subject	Page No.
6.0 ECONOMIC IMPACT OF EVENTS	51
6.1 Local Impact	51
6.2 Tourism Impact	53
6.3 Economic Impact - Conclusions	62
7.0 CONCLUSIONS AND RECOMMENDATIONS	70
7.1 Conclusions	70
7.2 Recommendations	74

EXECUTIVE SUMMARY

1.0 INTRODUCTION

A Study to Determine the Impact of Events on Local Economies is one of a series of study initiatives undertaken by the Canada/ Saskatchewan Tourism Planning Steering Committee. The principal objective of these study initiatives is the development and implementation of a Saskatchewan Tourism Strategy. The Events Study focusses on an analysis of the role and impact that Saskatchewan events are now or could be playing in stimulating tourism travel and expenditure.

Objectives of the Study

Although Saskatchewan's events have been long thought to have an impact on tourism travel and expenditure, they have never undergone serious investigation as to the impact they are now having or could have. As a result the principal objective of the study is to:

> Determine the economic impact of events at the community level and the ability of events to attract visitors.

In realizing this objective a profile of Saskatchewan's events emerges as to:

- attendance
- market area
- expenditure impact
- visitor profile
- impact on local and provincial economies

In developing this profile, the relationship of events to a Provincial Tourism Strategy can be better understood in terms of their potential for development in realizing the goals of a Tourism Strategy.

2.0 APPROACH

One of the biggest obstacles in studying the tourism potential of Saskatchewan events is the lack of an accurate data base -- how many events are there and what is their attendance? Further, if that information is available what is the proportion of local to non-local and out-of-province visitors, what expenditure does this create for a local community and does it result in hotel utilization, shopping and restaurant expenditure? What are the attitudes of visitors to the events themselves -- will they return and what improvements are required?

Given these data and information requirements both a "desk" research program and field survey were undertaken. About 200 events were identified in Saskatchewan. The attendance, location and theme or type were determined through utilization of the Province's calendar of events and phone interviews with the host communities and events organizers themselves. From this profile a total of 26 events were selected for our field interview survey. Over 3,500 on-site face-to-face interviews were completed during the course of the year. The events organizers were very supportive of our field interview program. These interviews yielded invaluable information regarding existing market areas of events, the resulting tourism expenditure and visitor impressions.

The resulting data and information was then computerized to yield a market and economic impact statement for Saskatchewan events. Coupled with an interview program with events organizers and community leaders, conclusions then emerged as to the impact and role events could play in a Saskatchewan Tourism Strategy.

Our rationale for selecting these 26 events was based on the following factors:

- The sample should be reflective of event categories (i.e. festivals, sports, rodeo, themed/cultural events, arts/crafts, native events.
- Sampling should be regional, through the province and reflective of large and small communities.
- The sample should be biased in favour of larger events or events thought to have some tourism impact but not without some sampling of smaller events or events held in small communities.
- Sampling should be carried out throughout the year over all four seasons.
- There should be comparative events to allow for an analysis of two or more communities hosting similar events.
- Events should be selected that will allow for proper or accurate interviewing.
- Similar events held at different times of the year should be selected to assess if seasonality is a factor.

3.0 PROFILE OF SASKATCHEWAN EVENTS

As illustrated in Figure 1.0, Saskatchewan has almost 200 events attended by over 1.5 million people annually. The events generally fall into eight broad types or categories:

- Festivals
- Arts and Crafts Events
- Native Events
- Fairs
- Rodeos and Horse Racing/Shows
- Sports Events
- Novelty Events
- Themed Events

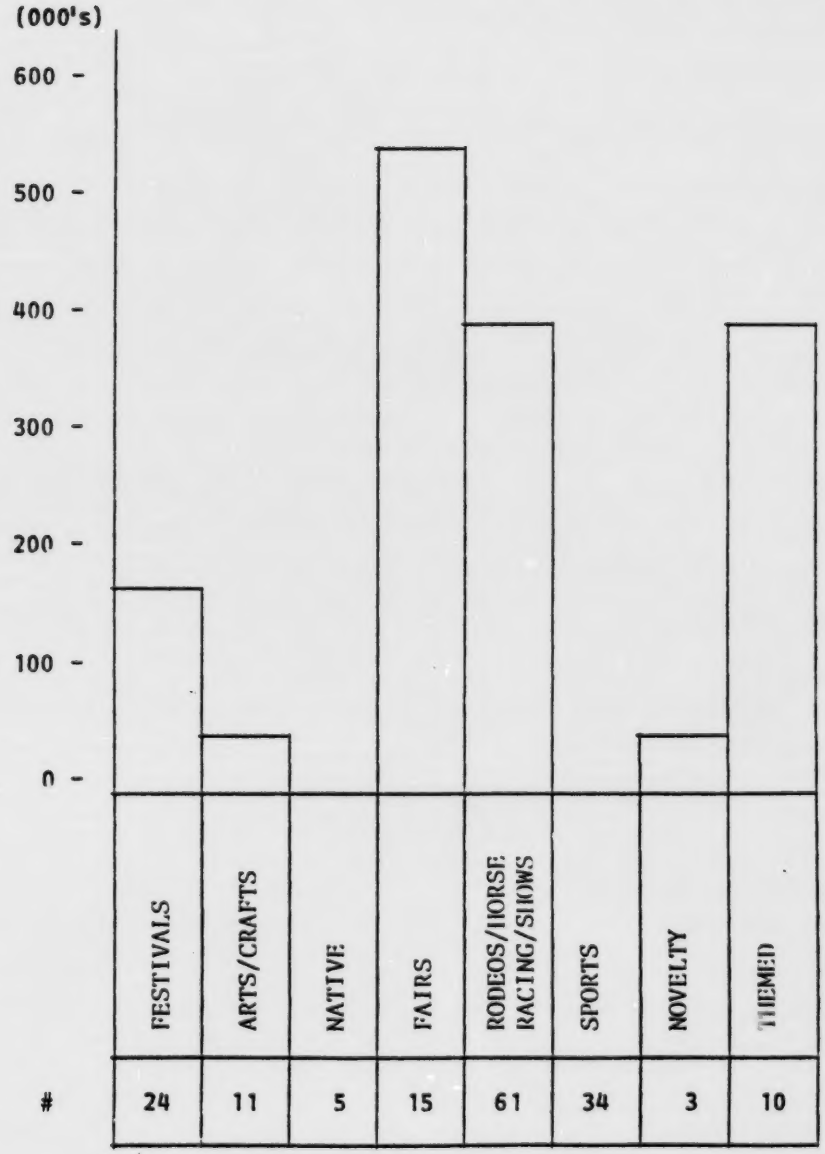
The vast majority of Saskatchewan events could be characterized as small local events with an average attendance of 9,723 people. Festivals, of which there are twenty-five, are largely characterized by ethnic festivals such as Mosaic (Regina) and Folkfest (Saskatoon) which both attract 30,000 visitors. Events of this nature held in Manitoba such as Folklorama have an attendance in excess of 70,000 people and are becoming increasingly popular. The largest music festival in Saskatchewan is Bosco Home's Big Valley Jamboree, a relatively new event, but a highly successful event that attracted 50,000 people.

Arts/crafts, Native and novelty events in Saskatchewan are not that numerous and the development of these events has been modest. Saskatchewan's largest handcraft event is the Saskatchewan Handcrafts Show/Sale held annually at Battleford and attracts upwards of 22,000 visitors. There has been virtually no development of Native events in Saskatchewan. Unlike Manitoba, there has been little development of novelty events such as Frog Follies and Turtle Derbies attracting more than 20,000 visitors to smaller Manitoba communities. In Saskatchewan events such as Wynyard's Chicken Chariot Races are still largely local events.

FIGURE 1.0

Types of Saskatchewan Events

1983



Total Number of Events* = 163
Total Attendance = 1,584,870

* Only those events for which attendance could be determined.

The sports events contained within our survey are really not that characteristic of Saskatchewan sports as they do not include competitively programmed sporting events such as the Saskatchewan Roughriders. Our events included skiing, figure skating, curling and other community hosted events.

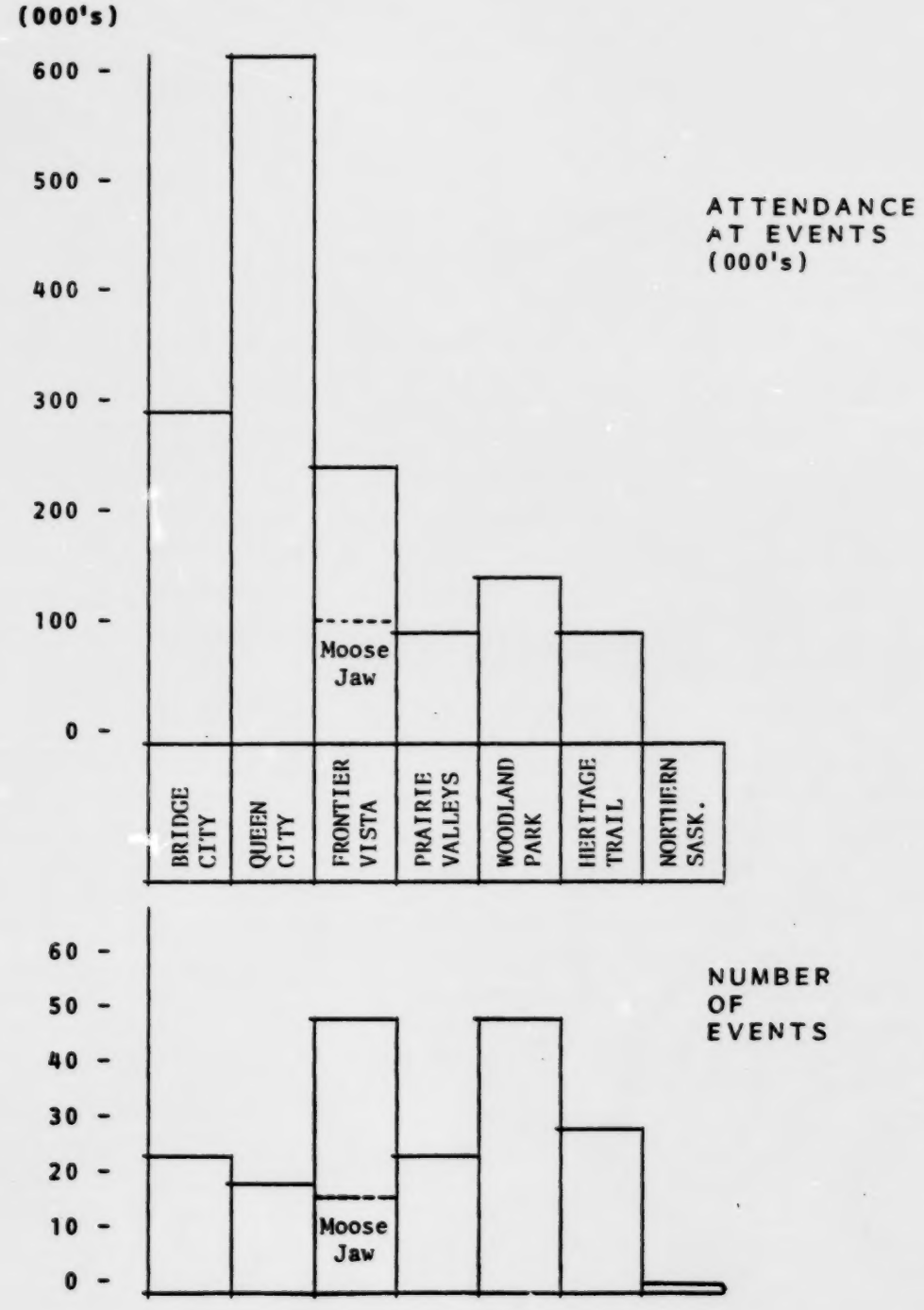
Fairs are still one of the most historically popular Saskatchewan events, with some being over 70 years of age. The largest is Regina's Buffalo Days attracting 240,000 visitors. By far the most popular event in Saskatchewan are rodeos. However there are only a few rodeos attracting significant visitation such as Bosco Home's Big Valley Rodeo/Stampede (30,000 - 40,000 visitors) and the Agribition indoor rodeo (25,000 visitors).

Lastly, themed events include some relatively large events such as the Canadian Western Agribition (150,000 people), Saskatoon Mexabition and Western Farm Progress Show, both attracting 30,000 or more visitors. In previous year's Moose Jaw's Air Show/Fair has attracted upwards to 100,000 people.

Figure 2.0 presents a comparative graphic of all Saskatchewan events on the basis of defined travel regions or destinations. Based on an analysis of attendance at all Saskatchewan events, the City of Regina has had the greatest success in attracting visitors to its events. In comparison to Regina it appears that Saskatoon has done relatively little to develop events as it has slightly more annual events than Regina but receives less than half the visitation of Regina's events. Moose Jaw appears to have performed well in events development in comparison to larger centres.

FIGURE 2.0

Number and Attendance of Saskatchewan Annual Events by Region



4.0 SASKATCHEWAN EVENTS FIELD SURVEY

Table 1.0 indicates the events that were sampled in our field survey from the fall of 1983 to the summer of 1984. An on-site survey questionnaire involving 4,000 interviews was implemented to collect the following data:

- Origin of Attendance at Event
  - Host Community
  - Saskatchewan
  - Canada
  - U.S.A.
  - International
- Travel Characteristics
  - Mode of Travel
  - Number of People in Party
  - Accommodation Required
  - Travel Expenditure
  - Length of Stay
- Event Characteristics
  - Reason for Attending (the event itself or other)
  - Repeat/First Time Attendance
  - Visitor Impressions of Event/Facilities
  - Expenditure at Event

TABLE 1.0

Sample Selection of Saskatchewan Events

Event Category	Location	Estimated Attendance	Number of Events Interviews	Number of Events Surveyed	Season Sum.	Fall	Win.	Spr.
Festivals								
* Big Valley Jamboree	Craven	50,000	207		1			
Folkfest	Saskatoon	25,000	300				1	
Mosaic	Regina	25,000	42					1
Moose Jaw Bandfest	Moose Jaw	26,000	33					1
Optimist Bandfest	Regina	4,000	54					1
Yorkton Filmfest	Yorkton	100	27			1		
Total		130,100	663	6				
Rodeos								
Big Valley (Fall '83)	Craven	40,000	262			1		
* Big Valley (Spr. '84)	Craven	25,000	61					1
Humboldt (Indoor)	Humboldt	6,000	22			1		
* Regina Horse Show	Regina	10,000	50					1
Total		81,000	395	4				
Sports								
* Yorkton Hockey Tourn.	Yorkton	15,000	42				1	
* S. C. Hockey Tourn.	Swift Current	14,000	135				1	
* National Figure Skating	Regina	20,000	103				1	
Sask. 60	Duck Lake	900	15				1	
* P. A. Mixed Curling	Prince Albert	1,000	92				1	
Total		50,900	387	5				
Themed								
Agribition	Regina	150,000	596			1		
Wstrn. Farm Prog. Show	Regina	40,000	151		1			
Mexabition	Saskatoon	50,000	478		1			
Moose Jaw Air Show	Moose Jaw	30,000	400		1			
Total		270,000	1,625	4				
Arts/Crafts								
Sundog	Saskatoon	8,000	50			1		
Bazart	Regina	10,000	48		1			
Sask. Handcraft Festival	N. Battleford	22,000	64		1			
Total		40,000	162	3				
Fairs								
Buffalo Days	Regina	240,000	200	1	1			
Novelty (Other)								
Those Were The Days	N. Battleford	2,600	71		1			
Heritage Bus Tours	Saskatoon	690	7		1			
Total		3,290	78	2				
Native								
Fort Qu'Appelle Pow-Wow	Standing Buffalo I.R.	1,000	25	1	1			
TOTALS		816,290	3,535	26	10	5	6	5

* Events not identified in the Appendix.

5.0 MARKET CHARACTERISTICS FOR SASKATCHEWAN EVENTS

Market Area

As we were most interested in the tourism impact resulting from the sampled events the surveys sought to determine attendance from those persons travelling 50 miles or greater (the conventionally accepted definition of tourism travel) to attend the event from Saskatchewan and out-of-province destinations.

Table 2.0 indicates that, on average, the events surveyed were clearly not local events with only local and regional appeal. Only 38.1% of the attendance was drawn from the host community. There were some exceptions to this such as the province's two largest cultural festivals, Mosaic and Folkfest, which, at this point, would be characterized as local events relying on the local market for over 75% of their attendance (76.9% in the case of Folkfest and 90.5% in the case of Mosaic). Two of the arts/crafts events surveyed, Bazart and Sundog, were also largely local events with 86.0% and 79.2% of their attendance, respectively, being local. In other cases events such as the Western Farm Progress Show, Agribition, Swift Current Midget Hockey Tournament and Big Valley Jamboree were having considerable tourism travel impact with 60% - 80% of the attendance being drawn from the tourism travel markets. In general, themed events had the greatest tourism impact.

As to the location of those tourism markets almost 74% were drawn from Saskatchewan travel markets. The largest out-of-province market was the province of Alberta, accounting for 10.3% of tourism travel to all events. Sporting events, in particular the two hockey tournaments surveyed and the National Figure Skating Finals, achieved the greatest impact on out-of-province tourism travel.

TABLE 2.0

Local, Regional and Tourism Markets

Events	Attendance	Sample	Local and Regional Market						Tourism Market			
			Total Local Attendance		Regional Attendance 0-15 Miles	15-30 Miles	Total Reg. Attendance		Tourism Attendance 30-150 Miles	>150 Miles	Total Tourism Attendance	
		#	#	%	#	#	#	%	#	#	#	%
Festivals												
Big Valley Jamboree	50,000	207	35	16.9	0	41	41	19.8	56	75	131	63.3
Folkfest	25,000	300	230	76.7	3	12	15	5.0	18	37	55	18.3
Mosaic	25,000	42	38	90.5	0	2	2	4.8	1	1	2	4.8
Moose Jaw Bandfest	26,000	33	16	48.5	0	12	12	36.4	1	4	5	15.2
Optimist Bandfest	4,000	54	21	38.9	2	4	6	11.1	21	6	27	50.0
Yorkton Filmfest	100	27	9	33.3	0	0	0	0.0	11	7	18	66.7
Total	130,100	663	349	52.6	5	71	76	11.5	108	130	238	35.9
Rodeos												
Big Valley (Fall '83)	40,000	262	12	4.6	40	79	118	45.0	67	65	132	50.4
Big Valley (Spring '84)	25,000	61	37	60.7	0	4	4	6.6	12	8	21	32.8
Humboldt (Indoor)	6,000	22	11	50.0	2	3	5	22.7	4	2	67	27.3
Regina Horse Show	10,000	50	23	46.0	0	6	6	12.0	6	15	21	42.0
Total	81,000	395	83	21.0	42	92	133	33.7	89	90	179	45.3
Sports												
Yorkton Hockey Tourn.	15,000	42	32	76.2	0	0	0	0.0	2	8	10	23.8
S. C. Hockey Tourn.	14,000	135	45	33.3	1	5	6	4.4	13	71	84	62.2
Skate Canada	20,000	103	40	38.8	0	6	6	5.8	20	37	57	55.3
Sask. '60	900	15	6	40.5	0	3	3	20.0	2	4	6	40.0
P. A. Mixed Curling	1,000	92	63	68.5	1	5	6	6.5	2	21	23	25.0
Total	50,900	387	186	48.1	2	19	21	5.4	39	141	180	46.5
Themed												
Agribition	150,000	596	133	22.3	5	80	5	14.3	189	189	378	63.4
Watrn. Farm Prog. Show	40,000	151	11	7.3	3	17	0	13.2	61	59	120	79.5
Hexibition	50,000	478	152	31.8	16	99	5	24.1	167	38	205	42.9
Moose Jaw Air Show	30,000	400	184	46.0	3	34	7	9.3	78	101	179	44.8
Total	270,000	1,625	480	29.5	27	230	17	15.8	495	387	882	54.3
Arts/Crafts												
Sundog	8.000	50	43	86.0	1	1	2	4.0	3	2	5	10.0
Bazart	10,000	48	38	79.2	1	1	2	4.2	2	6	8	16.7
Sask. Handcraft Fest.	22,000	64	13	20.3	0	6	6	9.4	28	17	45	70.0
Total	40,000	162	94	58.0	2	8	10	6.2	33	25	58	35.8
Fairs												
Buffalo Days	240,000	200	115	57.5	1	23	24	12.0	31	30	61	30.5
Novelty (Other)												
Those Were The Days	2,600	71	32	45.1	0	6	6	8.5	11	22	33	46.4
Heritage Bus Tours	690	7	3	42.9	0	0	0	0.0	0	4	4	57.2
Total	3,290	78	35	44.9	0	6	6	7.7	11	26	37	47.4
Native												
Fort Qu'Appelle Pow-Wow	1,000	25	4	16.0	1	1	2	8.0	13	16	19	76.0
TOTALS	816,290	3,333	1,346	38.1	80	549	329	15.0	809	846	1,657	46.9

Visitor Characteristics

Saskatchewan events were shown to be family oriented as almost 60% of the people attending the events did so with family members. Even events such as the Western Farm Progress Show and Agribition were regarded as family events.

Market Support and Visitor Impressions

Generally persons attending these events were satisfied with their experience at the events as over 90% would return again and 85% would encourage others to do so. However both event, facility and service improvements are required as 45% of the people surveyed felt improvements were necessary. In eight of the 26 events surveyed over 50% of the people interviewed felt improvements were required at the event in terms of expanding the event, improving its facilities and services. These events were the three Big Valley events organized by Bosco Homes, Folkfest, Mosaic, the Western Farm Progress Show, Sundog and the Moose Jaw Air Show.

6.0 ECONOMIC IMPACT

Tourism Expenditure

Table 3.0 indicates that the total tourism expenditures resulting from persons travelling more than 50 miles to attend the events was $68.2 million. The average per person expenditure was $175.87. An important observation from this table is that for every $24.72 events receive from tourists the community receives $151.75. This is an important point that should effectively demonstrate that communities should be very supportive of events.

Sporting events emerged as having the highest average trip expenditure at $344.09 with the Prince Albert Mixed Curling Finals leading the way at an average trip expenditure of $568.21. However, in regard to total tourism expenditure, the City of Regina's Agribition and Buffalo Days were the largest events generating $19.6 million and $17.2 million in tourism expenditure, respectively. Only six events, in addition to Agribition and Buffalo Days, exceeded $2.0 million in tourism expenditure.

	Attendance	Average Spend	Total Tourism Expenditure
National Figure Skating Finals	20,000	$397.25	$4,393,437
Western Farm Progress Show	40,000	139.52	4,436,842
Big Valley Jamboree	50,000	131.48	4,176,982
Swift Current Hockey Tourn.	14,000	302.01	2,629,878
Big Valley (Fall '83)	40,000	107.89	2,175,134
Mexabition	50,000	114.82	2,432,852

TABLE 3.0

Tourism Expenditure Impact Resulting from Events

Event Category	Estimated Attendance At Event	% That Are Tourists	Average Per Person Travel Expenditure	Total Travel Expenditure	Avg. Per Tourist Expenditure at Event	Total Tourism Expenditure at Event	Avg. Per Tourist Expendi-ture	Total Tourism Expenditure
Festivals								
Big Valley Jamboree	50,000	63.3	86.11	$ 2,725,282.44	$ 45.87	$1,451,699.05	$131.98	$ 4,176,981.49
Folkfest	25,000	18.3	183.19	838,056.82	47.86	218,954.13	231.05	1,057,011.95
Mosaic	25,000	4.8	168.75	202,500.00	34.12	40,940.77	202.87	243,440.77
Moose Jaw Bandfest	26,000	15.2	283.00	1,118,416.00	10.17	40,178.67	293.17	1,158,594.67
Optimist Bandfest	4,000	50.0	68.65	137,307.69	19.87	39,731.65	88.52	177,039.39
Yorkton Filmfest	100	66.7	202.49	13,506.75	18.23	1,216.13	220.72	14,722.88
Total	130,100	35.9	114.43	5,035,069.70	28.74	168,313.36	143.17	5,203,383.06
Rodeos								
Big Valley (Fall '83)	40,000	50.4	76.17	1,535,672.73	31.72	639,461.44	107.89	2,175,134.17
Big Valley (Spr. '84)	25,000	32.8	107.50	881,500.00	28.82	236,442.95	136.23	1,117,943.96
Humboldt (Indoor)	6,000	27.3	17.50	28,665.00	11.92	19,530.00	29.42	48,195.00
Regina Horse Show	10,000	42.0	320.23	1,345,000.00	27.75	116,545.47	347.98	1,461,545.47
Total	81,000	45.3	110.86	3,790,837.73	29.59	1,059,414.23	140.45	4,850,251.96
Sports								
Yorkton Hockey Tourn.	15,000	23.8	267.92	956,462.50	20.68	73,828.57	288.60	1,030,291.10
S. C. Hockey Tourn.	14,000	62.2	273.96	2,385,629.17	28.05	244,240.06	302.01	2,629,878.23
National Figure Skating	20,000	55.3	350.23	3,873,425.44	47.02	520,011.71	397.25	4,393,437.15
Sask. 60	900	40.0	42.50	15,300.00	14.78	5,320.00	57.28	20,620.00
P. A. Mixed Curling	1,000	25.0	518.48	129,619.57	49.73	12,432.07	568.21	142,051.64
Total	50,900	46.5	307.35	7,360,436.67	36.74	793,412.00	344.09	8,153,848.67
Themed								
Agribition	150,000	63.4	180.42	17,157,625.00	26.63	2,532,697.43	207.05	19,690,322.43
Wstrn. Farm Prog. Show	40,000	79.5	117.58	3,739,150.00	21.94	697,692.00	139.52	4,436,842.00
Mexabition	50,000	42.9	100.86	2,163,572.56	12.55	269,278.92	114.82	2,432,851.48
Moose Jaw Air Show	30,000	44.8	92.29	1,240,460.87	13.96	187,622.40	106.25	1,428,083.27
Total	270,000	54.3	150.19	24,300,808.43	19.13	3,019,023.15	169.32	27,319,831.58
Arts/Crafts								
Sundog	8,000	10.0	65.50	52,400.00	17.04	13,631.45	82.54	66,031.45
Bazart	10,000	16.7	240.94	402,365.63	23.59	39,388.77	264.53	441,754.40
Sask. Handcraft Festival	22,000	70.0	66.22	1,019,822.22	30.40	468,176.59	96.62	1,487,998.81
Total	40,000	35.8	82.52	1,474,587.85	24.63	372,677.64	106.15	1,847,265.68
Fairs								
Buffalo Days	240,000	30.5	209.50	15,336,000.00	26.63	1,949,663.68	236.13	17,285,663.68
Novelty (Other)								
Those Were The Days	2,600	46.4	59.70	72,018.42	4.23	5,100.93	63.93	77,119.35
Heritage Bus Tours	690	57.2	490.63	193,639.88	3.14	1,240.42	493.77	194,880.30
Total	3,290	47.4	165.93	265,658.30	4.16	6,238.76	170.09	271,897.06
Native								
Fort Qu'Appelle Pow-Wow	1,000	76.0	176.30	134,000.00	12.11	9,202.53	188.41	143,202.53
TOTALS	**816,290**	**46.9**	**151.15**	**57,864,191.87**	**24.72**	**10,369,966.43**	**175.87**	**68,234,158.20**

Economic Impact

The tourism expenditure associated with the 26 events surveyed would have accounted for 6.8% of Saskatchewan's total tourism expenditure and 4.8% of total tourism travel in Saskatchewan. Although our sample represents roughly half of the total attendance at all Saskatchewan events it includes some of the major events held in Saskatchewan which have significant tourism travel associated with them. It does not include many of the Province's smaller events that are purely of local and regional significance and not likely to have much in the way of tourism travel associated with them. Without a registry of Saskatchewan events, it is impossible to have a complete inventory of events held annually or otherwise. Although our sample does contain a number of the Province's larger events, we still feel it is reasonably reflective of all events held in Saskatchewan. A small event can conceivably attract the same percentage of tourists as do large events. In some cases large events such as Mosaic and Folkfest have attracted few tourists.

Given this, we feel that our sample is representative of the total tourism expenditure impact that Saskatchewan events have on the Province's tourism economy. The total attendance identified for all Saskatchewan events is estimated to be 1.7 million people. This figure includes the attendance of 7 events contained within our sample but not within the provincial calendar of events. If we assume that of this total attendance 46.9% of the people are tourists and on average their per person expenditure is $175.87, then the total tourism impact associated with all Saskatchewan events is $140.2 million or 14% of total tourism expenditure in Saskatchewan.

Lastly, we have also determined the direct employment impact resulting from Saskatchewan events. The employment estimates were derived from

applying an estimated employment ratio of 33.8 person years of direct employment resulting from $1.25 million in tourism expenditure.* The total employment impact from all events would be 3,791 or 14% of Saskatchewan's total tourism employment.

Given the data and information developed, Saskatchewan events are making a significant contribution to Saskatchewan tourism. Most importantly they positively impact on a structural problem in the Saskatchewan industry, which is the low trip expenditure resulting from Saskatchewan travel markets. Trip expenditure in Saskatchewan is the lowest in Western Canada and 25% lower than the average for Canadian trip expenditure.

---

* Source: Saskatchewan Tourism Strategy, prepared for the Governments of Saskatchewan and Canada by Derek Murray Consulting Associates, Marshall Macklin Monaghan and Thorne Stevenson Kellogg.

7.0 CONCLUSIONS

Concerning the realization of the study's principal objective "to determine the economic impact of events at the community level and the ability of events to attract visitors", the results of our analysis have determined and desribed the economic impact of Saskatchewan events and has shown it to be considerable. Of the 26 events surveyed, on average 46.9% of their attendance was drawn from tourism markets. The estimated tourism expenditure impact for all Saskatchewan events was estimated to be $140 million or 14% of total tourism expenditure in Saskatchewan. The following table provides a comparison between Saskatchewan and events' tourism travel markets and expenditure impact:

Comparison Between Saskatchewan and Events' Tourism Markets and Expenditure Impacts

	Tourism Travel Characteristics	
	Saskatchewan	Events
. Origin of Tourism Visitation		
Saskatchewan Residents	76.8%	73.9%
Canadians	16.8%	21.7%
U.S.A.	6.0%	3.0%
International	.4%	1.5%
. Per Trip Expenditure	$ 103.90	$ 175.87
. Total Tourism Expenditure	1 Billion	140 Million
. Tourism Employment	27,000	3,791

In relationship to a Saskatchewan Tourism Strategy events could play an important role. The three principal objectives for Saskatchewan's Tourism Strategy are:

1. Increase the level of trip expenditure made in Saskatchewan.
2. Increase Saskatchewan's share of non-residential travel.
3. Improve Saskatchewan's image as a destination for business and pleasure travel.

At present events largely impact on the first objective. Expenditure associated with events is almost double the level of trip expenditure for Saskatchewan tourism travel. The reason for this is that the events themselves are motivators for destination travel in Saskatchewan resulting in extended stays in Saskatchewan communities and greater tourism travel expenditure. Regarding the second objective events have not really resulted in increasing Saskatchewan's share of non-resident or out-of-province travel. They attract only slightly more out-of-province travel than does the Saskatchewan industry itself. Regarding the last objective, events are having some impact on improving Saskatchewan's image as a destination for business and pleasure travel. However this was largely confined to sporting events where Saskatchewan was seen to have an excellent reputation as a "hosting" province. Sports events had the greatest impact on out-of-province travel markets. However, in general, their has been little development of linkages between events and attractions to improve Saskatchewan's destination image -- (i.e. it is the event and not the province or community that is the destination). Events have not been integrated with community tourism development and marketing.

On the basis of our analysis, we have recommended that the development of events be considerably elevated within the Province's tourism industry. This would come in the form of program support from senior and local governments designed to assist in their further development, through facility improvements, and, in particular, product and market development that would have much greater impact on out-of-province markets.

Strategically, we have suggested directions for the future development of events at both the provincial and community levels. Provincially we have attempted to identify those events that should be priorized for development. Locally we have made recommendations as to how the development of events would be more effectively integrated with local tourism planning and the development of greater tourism impact potential for Saskatchewan communities. Many Saskatchewan communities are already benefiting significantly from events. On average, for every $1 events organizers receive, $6 in tourism expenditure is spent in the local community. Clearly support by local communities for events has a strong economic rationale.

1.0 INTRODUCTION

1.1 Objectives for the Study

A Study to Determine the Impact of Events on Local Economies was one of four major studies solicited simultaneously by the Canada/ Saskatchewan Tourism Planning Steering Committee. They included a Saskatchewan resident market survey, out-of-province market survey and the development of a Tourism Strategy for the Province. Each of these initiatives was to provide material for the consideration of the Governments of Saskatchewan and Canada in effectively planning and implementing greater tourism development for Saskatchewan.

The primary objective of these initiatives was the development and implementation of a Tourism Strategy. In the case of the Events Study, it has been thought that events are considered as travel "motivators". As a result the key findings and conclusions emerging from the Events Study are specifically related to the development of a Tourism Stragegy. The assessment of the tourism impact of events, therefore, is viewed as an integral component in the development of a strategic plan for marketing and support programs which are likely to form part of the implementation of a provincial tourism strategy.

The principal objective for the study was "to determine the economic impact of events at the community level and the ability of these events to attract visitors". In realizing this objective the Committee had identified the following principal data and information requirements:

. catchment of visitors to these events

. number of visitors to these events

- proportion of Saskatchewan residents to out-of-province visitors to these events
- expenditures of local versus visitors during the duration of the event
- length of stay of visitors and origin
- type of accommodation used by visitors
- party characteristics of visitors
- proportion of first-time to repeat visitors to these events
- indication of events that visitors would like to have in Saskatchewan
- current marketing strategy and marketing budgets associated with selected events

In relationship to a tourism strategy for the Province through realization of the study's objectives and development of the data requirements, an understanding of the character of Saskatchewan events would result as to:

- How events are organized and managed.
- Unique features of their appeal such as theme, special attractions, diversity, etc.
- Difficulties encountered, such as funding, history of performance, lack of services/amenities.
- Identification of programs to overcome constraints and encourage events which have major tourism impacts or have the potential for major tourism impacts.

In our view the study provides a model for assessing impacts as well as for analyzing and diagnosing problems or identifying opportunities related to improving impacts. As a result the study will allow the Governments of Saskatchewan and Canada to integrate the development of events within an overall tourism strategy to stimulate tourism travel and expenditure in Saskatchewan.

1.2 Approach

In keeping with the objectives for the study a methodology was developed that would produce the following:

- a quantified measurement of the contribution of events impacts on Saskatchewan Tourism
- an assessment of the relative order of magnitude contribution of tourism by various types and sizes of Saskatchewan events
- an analysis of the capability of Saskatchewan events to make greater contribution to tourism growth in Saskatchewan.

Several key principals affected the development of our approach to this assignment.

- first, the methodological approach must result in quantifiable assessments which allow for cross comparison of the relative impacts of events.
- second, the methodology must incorporate a sample stratification which allows for prediction of event impacts for all types and sizes of events.
- third, the analysis of impacts must be possible within the context which gives rise to the impacts. In other words, the study must not only yield quantifiable ratings but provide analysis as to the factors most critically affecting the variability of impacts - particularly among similar events.
- fourth, the study must address impacts comprehensively including those impacts which are not quanitifiable in a statistical sense. For example benefits such as the impact on cultural opportunities would be one of many such considerations.

As a result a 6 phase approach was implemented in conducting the study. These phases are summarized as follows:

Phase I — Confirmation of Study Requirements -

involving the finalization and Steering Committee approval of the methodology, sample selection of the number and type of events to be surveyed. As a result 26 events were selected as being a representative cross section of Saskatchewan events.

Phase II — Implementation of the Interview and Consultations Program -

This phase was really the core of the study program involving the following tasks:

- Development/Testing of an event survey interview instrument
- Implementation/Administration of a survey of 26 events
- Completion of 4000 face-to-face surveys
- Implementation of a sponsor organizer consultations program
- Implementation of an industry impact consultations program.

Phase III — Quantification of Impacts -

Computer tabulation and analysis of the intercept survey results as well as the ranking of events based on factors such as catchment area, percentage of non-resident visitation, expenditure impact, etc.

Phase IV — Events Capability - Opportunities and Constraints Assessment -

This phase involved the review of data obtained through interviews with sponsors/organizers and local hospitality and retail/business respresentatives leading to the development of an opportunities/constraints profile for various events and event categories.

Phase V — Conclusions, Recommendations, Preparation of Draft Study Report -

This phase involved the assessment and ranking of events by quantified impact, as well as the assessment of alternative approaches to improving the inputs of various events through opportunity, development and constraints removal and their importance and integration with a provincial tourism strategy.

Phase VI — Preparation and Submission of the Final Report -

Following a review of the "draft" final report in Phase V, by the Steering Committee, changes, corrections and format suggestions were incorporated into the final report.

2.0 DESCRIPTIVE PROFILE OF SASKATCHEWAN EVENTS

2.1 Introduction

Events have always figured prominently in Saskatchewan's history and culture. In certain instances annual events can be traced back to the formation of Saskatchewan as a province and as far back as the 19th Century as in the case of the Regina Exhibition Association, which is celebrating its 100th year of organizing and managing events such as fairs. Several of Saskatchewan's 500 incorporated communities host annual events of one form or another; usually during the summer. Many of Saskatchewan's events have an almost historical association with community life in the province. They have always been an important characteristic of Saskatchewan's lifestyle of "getting together" such as a jamboree, rodeo, fair or sports tournament.

Events are often the common focus around which local associations or service clubs organize themselves. The Saskatchewan Roughriders, skating events, band festivals and agricultural events are all indicative of the Saskatchewan community's ability to organize and successfully develop local or national events. Often these events are expressions of the communities themselves. The capabilities of local service clubs and community organizations in hosting international events such as the Silver Broom or a national skating championship has not gone unnoticed. Saskatchewan has an excellent reputation as a "hosting" province.

Unfortunately, the undertaking of a study of Saskatchewan events is somewhat hampered by a lack of data and information as to their occurrence, type and attendance. A provincial registry for events would have been extremely helpful to our study program. As a

result we utilized the provincial government's events calendar supplemented with interviews with various communities and organizations in order to develop an inventory of events, their attendance and occurrence.

A total of 199 events were identified of which the vast majority occur annually. Each event was then classified as to location, seasonality, type and significance on a scale of purely local events to national and international events.

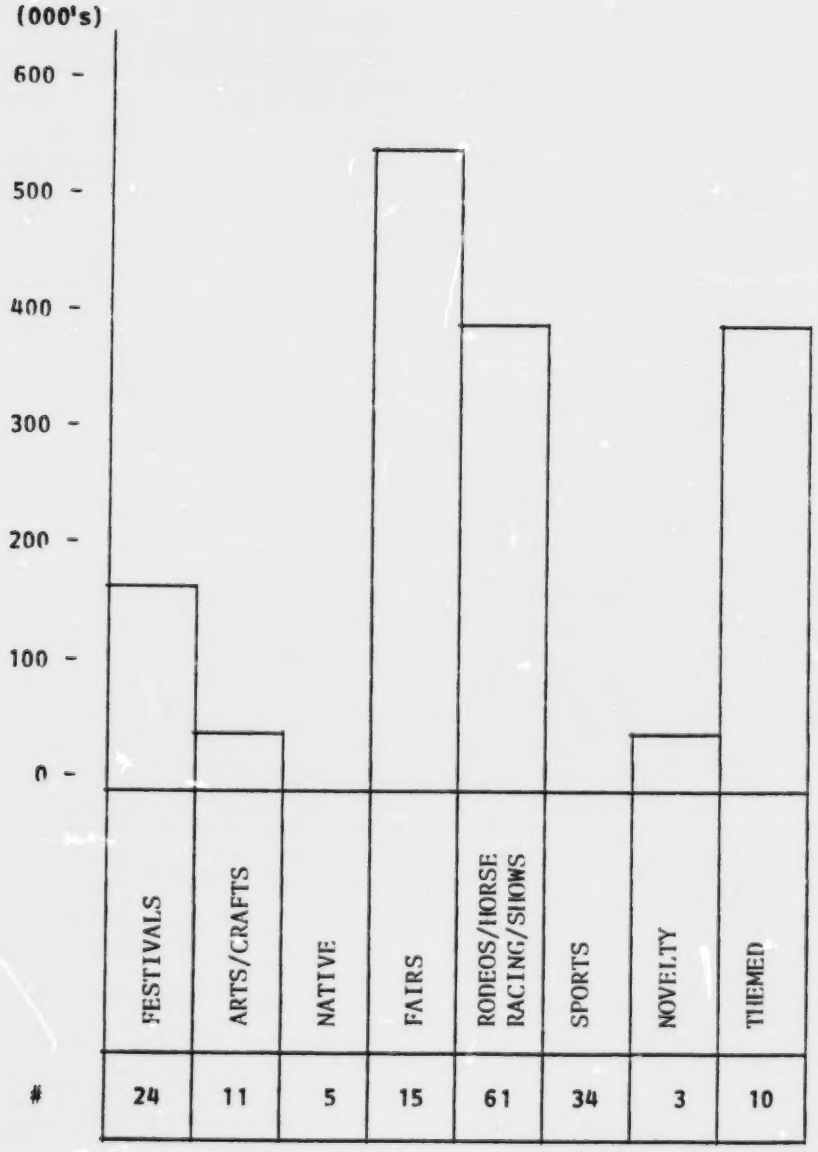
Saskatchewan events generally fall into eight broad types or categories:

- Festivals
- Arts and Crafts Events
- Native Events
- Fairs
- Rodeos and Horse Racing/Shows
- Sports Events
- Novelty Events
- Themed Events

Figure 1.0 displays the number, type and attendance associated with these eight classifications of Saskatchewan events. A complete listing of Saskatchewan events identified from the Provincial events' calendar and other sources is available in the Appendix of this report. Of the 199 events identified, attendance figures could only be determined for 163. The total attendance for these events was 1,584,870 people or an average attendance of 9,723 people per event. This suggests that the vast majority of Saskatchewan events have only local or regional market appeal. The following sections provide a more descriptive explanation as to the character and nature of each of the eight categories of events.

FIGURE 1.0

Types of Saskatchewan Annual Events
1983



Total Number of Events* = 163
Total Attendance = 1,584,870

* Only those events for which attendance could be determined.

2.2 Festivals

The most prevalent form of festivals are ethnic festivals, the largest of which are Mosaic and Folkfest, attracting up to 30,000 people each. They are relatively young events. The Multicultural Act (1974) provided a real impetus for cultural expression in Saskatchewan. As a result ethnic events such as Mosaic grew in popularity.

Saskatchewan has a modest amount (6) of winter festivals. These are all virtually local events such as Regina's WASKIMO which attracts 10,000 to 15,000 for a single day's outing.

Saskatchewan also has a limited number of folk festivals, the largest of which is the Redberry Folk Festival, attracting up to 3,500 people with folk entertainers from across Canada.

Other festivals include Kindersley's Goose Festival Days and band festivals held in Regina and Moose Jaw. Moose Jaw's (Kinsmen) Band Festival is one of the oldest events in the province (35 years) and attracts up to 20,000 people.

Perhaps the largest music festival ever held in the Province was the Big Valley Jamboree, organized by Bosco Homes near Craven. After a fairly unsuccessful event in 1983, the 1984 Jamboree attracted 50,000 people.

2.3 Arts and Crafts

A total of 19 arts and crafts events were identified. Arts and crafts are largely characterized by pottery and hand crafts but also include events such as film and video awards. The Saskatchewan Handcrafts Show/Sale held at Battleford is the largest in the province attracting up to 22,000 people.

2.4 Native Events

Only 8 Native events were identified of which 7 were Pow-Wows. In the cases of the Sakimay Indian Pow-Wow (Grenfell) and the Piapot Indian Pow-Wow, they are relatively significant attractions (5,000 - 6,000 people in attendance) with dance competitors from both Canada and the U.S. Only one Metis event, Metis Heritage Days at Batoche was identified with an estimated attendance of 4,000 to 5,000 people over two days.

2.5 Fairs

A total of 21 fairs were identified ranging from small community fairs/sports days with attendance of less than 5,000 people to major fairs such as Regina's Buffalo Days with an attendance of 230,000 to 300,000 people. Saskatchewan has a long history with community fairs, with some fairs being over 70 years of age.

2.6 Rodeos and Horse Racing/Shows

By far the most numerically significant type of event in Saskatchewan are rodeos, horse racing and horse shows. A total of 55 rodeos were identified, 5 horse shows and 5 horse racing events. Generally, most rodeos attract between 1,000 and 7,000 people. However, in the cases of Swift Current and Nipawin, attendance exceeds 10,000 people. The largest rodeos held in the province are the Agribition indoor rodeo held in November attracting 25,000 people and rodeos held at the Bosco Homes Big Valley site attracting upwards to 40,000 people.

In contrast to rodeos, horse shows and horse racing are declining

in popularity. Saskatoon is the horse/harness racing centre for Saskatchewan. The Regina Exhibition Association Ltd. still maintains its race track but the future for horse racing in Regina is very uncertain. On the other hand, Saskatoon's Prairieland Exhibition is committed to horse racing and intends to upgrade their racing program and facilities which see an attendance of 120,000 people over the racing season.

2.7 Sports Events

A total of 42 sports events were identified. This does not include scheduled competitive sports such as hockey teams, baseball teams and the Saskatchewan Roughriders. Sports events identified in the Saskatchewan Calendar of Events include downhill skiing, cross country skiing, figure skating, speed skating, curling, ball tournaments and fish derbys. Very likely, if a separate calendar for sports events in Saskatchewan were prepared, it would indicate a significant number of sports events as there are over 70 organized sports in the province. It is noteworthy that an international baseball championship was held in Kindersley in 1984. Saskatchewan has an excellent reputation as a hosting province for amateur sporting events. During the winter several Western amateur hockey tournaments are held in Saskatchewan.

2.8 Novelty Events

Only a small number of novelty events such as Balgonie's Bed Derby, Wynyard's Chicken Chariot Races were identified. In the case of Eston's Gopher Derby and Moosomin's Tractor Pull, attendance exceeded 5,000 people. Such events are extremely

popular in other provinces such as the Turtle Derby held at Boissevain, Manitoba and Nanaimo, British Columbia's bathtub races which is now a nationally televised event, drawing international competitors.

2.9 Themed Events

Lastly, a total of 14 themed events were identified. Generally the theme of these events was either historical, agricultural or commercial in nature. The largest event and most successful in terms of its tourism impact is the Canadian Western Agribition (150,000 in attendance) held annually in Regina. Moose Jaw's Armed Forces Day and Air Show, Saskatoon's Mexabition and the Western Canadian Farm Progress Show are also significant themed events attracting over 30,000 people in attendance.

3.0 CHARACTERISTICS AND SIGNIFICANCE OF SASKATCHEWAN EVENTS

3.1 Number, Attendance and Seasonality

Very few Saskatchewan events draw significantly large attendance. As indicated, the average level of attendance at events was ±9,700 for the province.

Table 1.0 indicates that only 22 events held annually in Saskatchewan draw over 20,000 people. Only five events attract over 60,000 people.

Figure 2.0 and 3.0 display the number, attendance and seasonality of Saskatchewan's Events. Fairs, rodeos and themed events are the most prevalent of all Saskatchewan events. However, Regina's Buffalo Days accounts for well over half the attendance at fairs. In terms of attendance it is the largest single event in the province of Saskatchewan.

Rodeos are the single most popular form of event in Saskatchewan, accounting for 27.6% of all Saskatchewan events. Attendance at Rodeos varies between 1,000 and 40,000 people. Small communities such as Wood Mountain and Shaunavon attract over 3,000 people to their rodeos. Rodeos occur thoughout the southern portion of the province and are generally concentrated in those regions with significant cattle populations in the southeast, southwest and northeast central areas of the province.

Themed events, given their limited number, resulted in the most significant attendance. Events such as Agribition, Moose Jaw's Air Show and the Western Canadian Farm Progress Show held in Regina clearly emerged as the principal forms of events that motivated tourism and travel in a significant way. Generally,

TABLE 1.0

Annual Attendance at Saskatchewan Events by Size of Attendance

Category	# of Events	% of Total	Total Attendance
1 - 999	46	28.2	13,470
1,000-4,999	66	40.5	153,400
5,000-9,999	17	10.4	107,000
10,000-19,999	12	7.4	134,000
20,000-29,999	12	7.4	285,000
30,000-39,999	2	1.2	60,000
40,000-49,999	2	1.2	85,000
50,000-59,999	1	9.6	50,000
60,500+	5	3.1	697,000
Total	163	100.0	1,584,870

Average Attendance = 9,723 people

most Saskatchewan events are of local and regional significance.

Festivals, of which Mosaic and Folkfest are the most significant accounting for over half the attendance, are still relatively young in nature. Most ethnic festivals are 8 years old or less.

Native events are perhaps more conspicuous in their absence both in terms of number and attendance. Also it is interesting to note that there is not a single native event in Regina's four largest population centres which have been experiencing increasing native immigration rates and populations.

Arts/crafts and novelty events, with the exception of the Battlefords handcraft sale and show, are generally small events. Lastly, the sports events identified are not that reflective of Saskatchewan sports. For example, the Winter Regional Games are not included, nor are a good number of professional and amateur sports events. The sports events identified in the Saskatchewan Calendar of Events were largely winter based and do not include hockey events.

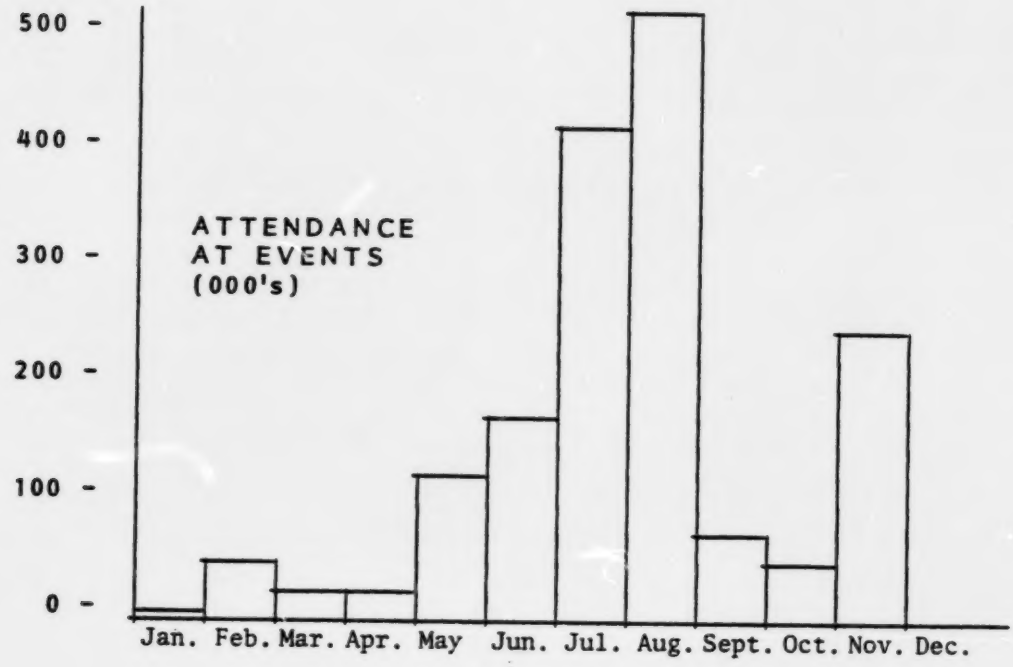
Figure 2 indicates that the summer accounts for a significant portion of the number of events but an even more significant portion of attendance. November's high attendance is largely due to events such as Agribition and Mexabition.

3.2 Regional Nature of Events

Figure 3 allocates the number and attendance of Saskatchewan annual events by tourism region previously defined by the former Department of Tourism and Renewable Resources. The City of Regina

FIGURE 2.0

Number, Attendance and Seasonality of Saskatchewan Annual Events



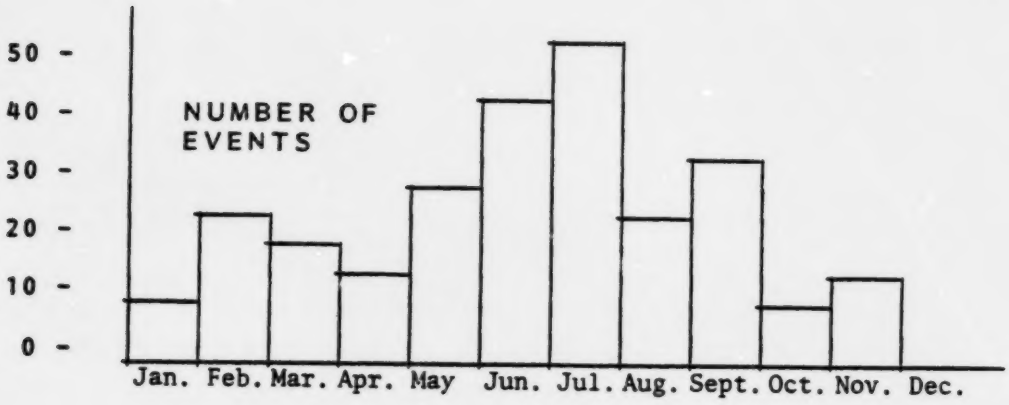
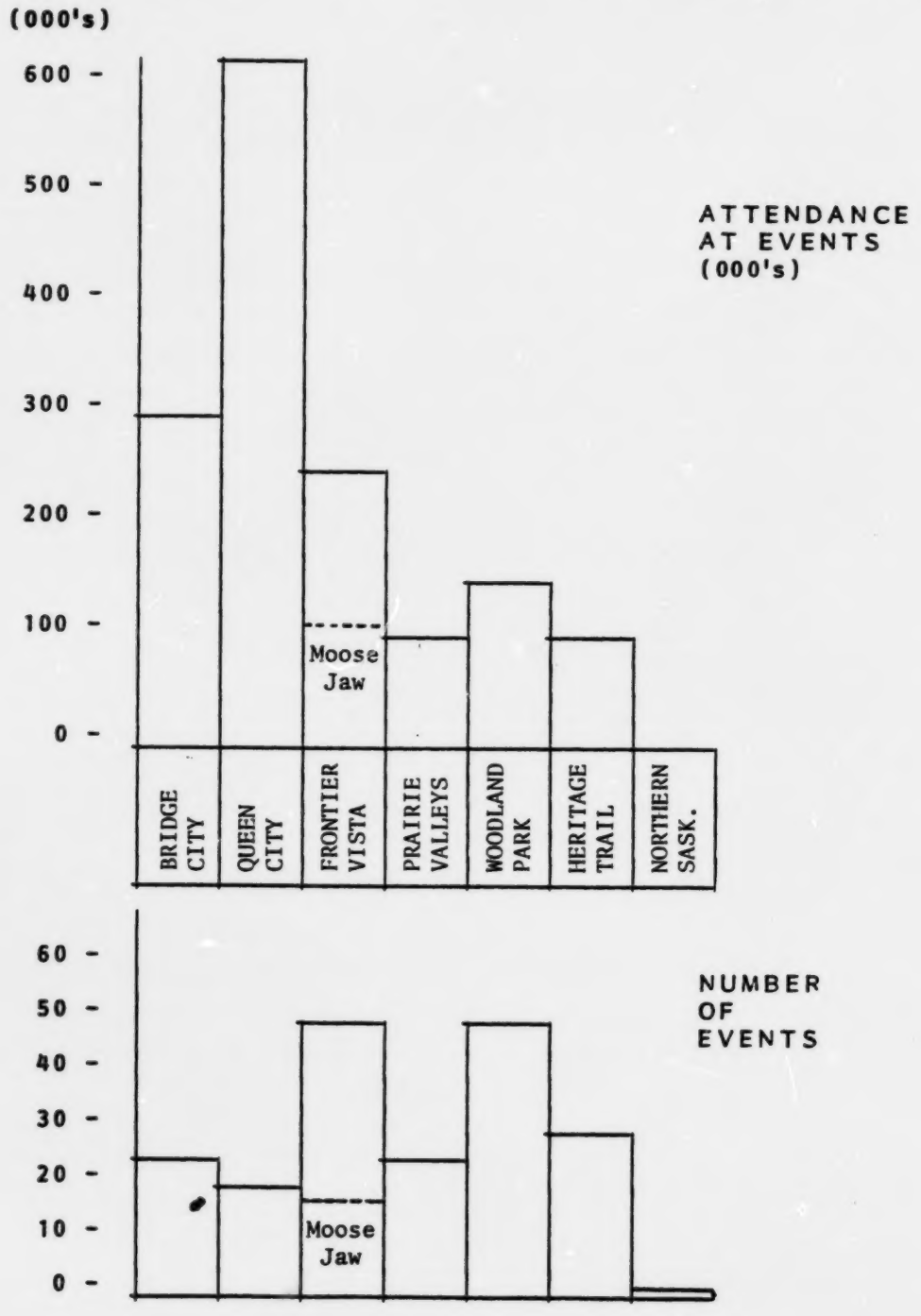


FIGURE 3.0

Number and Attendance of Saskatchewan Annual Events by Region



(Queen City) clearly emerges the most significant region in terms of the interest shown by people in attending events in the City. The City of Saskatoon (Bridge City), by comparison, is not an events orientated community, given the level of attendance at its events. The largest single event in the city is horse racing attracting over 100,000 people during the racing season. Technically this is not really an event but rather an attraction. Actual events in Saskatoon have an attendance of less than 200,000 people. Comparatively, the events in Saskatoon are of significantly less interest to people when we consider that Moose Jaw, a city with a population 1/5 Saskatoon's size, attracts 1/3 to 1/2 the number of people to its events. Again, comparatively, the "Friendly City" emerges as one of the most successful communities in the province in terms of attendance and number of events. Numerically the Frontier Vista and Woodland Park areas of the province accounted for the largest number of events. Both areas have significant numbers of rodeos and fairs. Only a limited number of events were identified for Northern Saskatchewan.

3.3 Significance

Table 2.0 indicates the relative significance of Saskatchewan events by tourism region. The vast majority (73.7%) of Saskatchewan's events have drawn local and regional appeal. At a level of provincial significance, 28 events were identified but a significant number were relatively small in size such as provincial downhill ski meets.

Only 23 events were identified that were of some significance to persons living outside of Saskatchewan. Of those 23, 7 events such as Agribition and the Western Farm Progress Show were thought to be of international significance. However the international visitation to these events was largely from the United States.

TABLE 2

Significance of Saskatchewan Events

	Intnl. Ntl.	Ntl.	Prov.	Reg.	Local	Total
Saskatoon	0	2	5	12	1	20
Regina	5	4	2	2	5	18
Frontier Vista	2	1	5	38	6	52
Prairie Valley	1	3	4	15	3	26
Woodland Park	0	4	5	38	4	51
Heritage Trail	0	1	8	20	0	29
N. Saskatchewan.	0	0	0	3	0	3
TOTAL	8	15	29	128	19	199
	4.0	7.5	14.6	64.3	9.6	100.0

4.0 SAMPLE SELECTION AND FIELD SURVEY

4.1 Sample Selection

It is almost impossible to draw a representative sample of events upon which to characterize all Saskatchewan events and their impact upon local economies. There are a number of reasons for this. Existing events are both diverse and numerous. It is virtually impossible to develop a complete inventory for all events. The nature of the events themselves is constantly changing with the addition of new events and deletion of existing ones. As well attendance at most events varies tremendously. For example, attendance at the Moose Jaw Air Show/Armed Forces Day/Air Fair will vary from 30,000 to 100,000 people depending upon the scale of the show. As a result we determined a number of criteria for the selection of our sample, upon which a number of conclusions could be drawn about the nature of events in general in Saskatchewan. In some cases one time only events such as the National Figure Skating Championships were selected to provide some indication of impact associated with the hosting of a national event with national television coverage. The following are some of the factors utilized in selected events for on-site interviews:

1. The sample of events should be reflective of event categories (i.e. festivals, rodeos, sports, themed, etc.).

2. The sampling should be regional in nature, reflective of the distribution of communities and urban populations in Saskatchewan and the existing distribution of events and their attendance.

3. The sample should be biased in favour of larger events that are thought to have some tourism impact but not without some sampling of events that are either small in size or held in smaller communities.

4. There should be a sampling of events throughout the year over all four seasons.

5. There should be comparative events to allow for an analysis of hosting similar events in two different communities (i.e. a hockey tournament held in Swift Current and in Yorkton or folk festivals held in Regina and Saskatoon) to determine if location of an event has some impact on its success.

6. Events selected should allow for proper interviewing. It is difficult to interview persons attending a spectator orientated event as opposed to a fair or exhibition.

7. Again for comparative purposes we selected events by time of year in order to determine if time of year made any difference to attendance at the event (i.e. a rodeo held in the spring and fall).

Table 3.0 indicates the selected sample for events where on-site interviews were administered. The sample is reasonably reflective of the seven factors cited above. The sample itself represents approximately half of the total estimated attendance for Saskatchewan events (estimate of 1.6 million people). Obviously we have considered the "top end" or larger events in our survey. The average attendance of these 26 events is 30,000 people (21,000 without Buffalo Days). The average attendance for all Saskatchewan events is 9,723 people. However, one of the considerations in our sample selection was the selection of events thought to be travel motivators drawing more than local or regional attendance.

It should be noted that seven of the events surveyed (as indicated by an asterisk in Table 3) are not contained within the 199 events we identified. In some cases these events are not annual events such as the two hockey tournaments. The inclusion of these two events as well as the National Figure Skating Championship and Curling Finals was necessary to have some indication of the impact of winter sports events. The two Big Valley events were not identified at the time of conducting our survey of all Saskatchewan events. They are both new events and given their size we felt that they should be sampled.

TABLE 3.0

Sample Selection of Saskatchewan Events

Event Category	Location	Estimated Attendance	Number of Events Interviews	Number of Events Surveyed	Season Sum.	Fall	Win.	Spr.
Festivals								
* Big Valley Jamboree	Craven	50,000	207		1			
Folkfest	Saskatoon	25,000	300				1	
Mosaic	Regina	25,000	42					1
Moose Jaw Bandfest	Moose Jaw	26,000	33					1
Optimist Bandfest	Regina	4,000	54					1
Yorkton Filmfest	Yorkton	100	27			1		
Total		130,100	663	6				
Rodeos								
Big Valley (Fall '83)	Craven	40,000	262			1		
* Big Valley (Spr. '84)	Craven	25,000	61					1
Humboldt (Indoor)	Humboldt	6,000	22			1		
* Regina Horse Show	Regina	10,000	50					1
Total		81,000	395	4				
Sports								
* Yorkton Hockey Tourn.	Yorkton	15,000	42				1	
* S. C. Hockey Tourn.	Swift Current	14,000	135				1	
* National Figure Skating	Regina	20,000	103				1	
Sask. 60	Duck Lake	900	15				1	
* P. A. Mixed Curling	Prince Albert	1,000	92				1	
Total		50,900	387	5				
Themed								
Agribition	Regina	150,000	596			1		
Watrn. Farm Prog. Show	Regina	40,000	151		1			
Mexabition	Saskatoon	50,000	478		1			
Moose Jaw Air Show	Moose Jaw	30,000	400		1			
Total		270,000	1,625	4				
Arts/Crafts								
Sundog	Saskatoon	8,000	50			1		
Bazart	Regina	10,000	48		1			
Sask. Handcraft Festival	N. Battleford	22,000	64		1			
Total		40,000	162	3				
Faire								
Buffalo Days	Regina	240,000	200	1	1			
Novelty (Other)								
Those Were The Days	N. Battleford	2,600	71		1			
Heritage Bus Tours	Saskatoon	690	7		1			
Total		3,290	78	2				
Native								
Fort Qu'Appelle Pow-Wow	Standing Buffalo I.R.	1,000	25	1	1			
TOTALS		816,290	3,535	26	12	5	6	5

* Events not identified in the Appendix.

More than 4,000 surveys were actually administered, but a number of responses (12%) were discarded as being obviously erroneous, incomplete or recorded improperly.

The questionnaire, utilized to survey these events, took under two minutes to execute. With the exception of only one event all events and the host organizations or bodies were extremely co-operative in allowing our interviewers to carry out their own on-site surveys. The key modules within the questionnaire for which information was sought could be summarized as follows:

- **Origin of Attendance at Event**
  - Host Community
  - Saskatchewan
  - Canada
  - U.S.A.
  - International

- **Travel Characteristics**
  - Mode of Travel
  - Number of People in Party
  - Accommodation Required
  - Travel Expenditure
  - Length of Stay

- **Event Characteristics**
  - Reason for Attending (the event itself or other)
  - Repeat/First Time Attendance
  - Visitor Impressions of Event/Facilities
  - Expenditure at Event

4.2 Description of Events Contained in Field Survey

The reader may not be entirely familiar with each of the events contained in the survey. As a result we have brief descriptions as to the nature and origin of each of the events surveyed.

Festivals

We have grouped all festivals together for purposes of analysis. There is considerable diversity in the number of festivals held in Saskatchewan. There are cultural festivals, band and music festivals as well as film festivals. The two largest cultural festivals held annually are Mosaic (Regina) and Folkfest (Saskatoon), both attracting upwards to 30,000 visitors. Both of these events were surveyed as part of our field interview program. Since the passage of the Province's Multicultural Act, various ethnic groups have emerged with greater public expression of their unique heritage through such vehicles as Mosaic and Folkfest. The festival concept centres around 25 - 30 pavilions, each representing a different culture where visitors can eat, drink and be entertained. The pavilions are scattered throughout the city in clubs, church halls and auditoriums. These events are also the principal annual source of revenue for participating cultural clubs and organizations to finance cultural programs and activities such as ethnic language programs.

Cultural festivals are largely local events and there has been little promotion outside the community. Regarding their promotion outside the host community, there are some significant constraints to be overcome in the events as tourism attractors. Both Mosaic and Folkfest have almost reached capacity as the existing pavilions could not accommodate more visitors. During our survey

of these events there were several complaints regarding line-ups, parking and travel distance between pavilions. Local busineses, although supportive of the events, feel that they have little impact on the local economy. Some restaurants have argued that the events actually take business away. Another constraint to achieving tourism impact is the lack of an international air gateway to Saskatchewan which would reduce the cost of travel by foreign visitors, friends and families to attend events such as Mosaic and Folkfest.

Regarding music festivals, three events were surveyed: the Downtowners Optimist Club of Regina's Band and Vocal Jazz Festival, the Kinsmen International Band Festival and Choral Competitions held at Moose Jaw and Bosco Home's Big Valley Jamboree. The Downtowners Optimist Club Band Festival is a relatively new event, now in its third year with participating bands and musical groups drawn from throughout Saskatchewan. The estimated attendance of 7,000 people during the two-day event is largely drawn from the participants and organizers of the event. The Moose Jaw Band Festival is a well established event now in its 35th year. Bands are attracted to the event from all western provinces and the United States. The average budget for a band to make the trip to Moose Jaw is estimated to be $10,000. Bands are accommodated in Moose Jaw, Caronport and Regina. Total attendance of both participants and visitors to the four-day event is estimated to be 26,000 people.

The 1984 Big Valley Jamboree was the largest event of its kind ever held in Saskatchewan. Essentially the concept for the event is a country music festival. Previous attempts by Bosco Homes and others failed to attract attendance of over 10,000 people to events of this kind. However, good weather, timing and the

calibre of professional entertainment resulted in an estimated 50,000 people attending the event. The event is held outdoors at Bosco Home's Big Valley site near Craven, Saskatchewan. The success of the event in terms of the number of people attending overwhelmed the organizers. The site and organization was not capable of accommodating that number of people. In order to continue hosting the event, facility and organizational improvements would be necessary.

Lastly, the Yorkton Film Festival is a unique event in Saskatchewan. Unfortunately attendance at the event has declined. Only an estimated 100 people attended the 1983 festival. The event is international in nature and features short films and video presentation. The event appears to currently lack both promotion and local community support.

Rodeos, Horse Shows and Horse Racing

In terms of the number and occurrence, rodeos are the most popular event in the province. However, only a very small number attract significant visitation. In our sample the larger rodeos such as the Big Valley Stampede/Rodeos were surveyed. We also surveyed a smaller indoor rodeo at Humboldt along with the Regina Horse Show. Bosco Homes is now into its third year of hosting events at its Big Valley Site. The concept of a professional rodeo was actually born of necessity for Bosco Homes. The original objective in developing the Big Valley Site and rodeo/stampede event was to generate revenue for the Society. The stampede is very similar to Manitoba's Morris Stampede which attracts 40,000 to 50,000 visitors. On only one occasion (the fall/83 Big Valley Round-up) did the rodeo attract 40,000 people. This year's spring rodeo

(Big Valley Stampede) was not well attended as problems were experienced with the weather and competition from existing events such as Mosaic. Both the Regina Horse Show and Humboldt indoor rodeo are much smaller events attracting less than 10,000 people.

Sports

In order to have a reflective sampling of both winter events and sports events our survey included only winter sporting events. Unfortunately arrangements could not be made to survey the International Youth Baseball Tournament at Kindersley. Two hockey tournaments, a national figure skating championship, a cross country ski event and a curling tournament were all sampled. These events were also distributed throughout the province at Yorkton, Swift Current, Regina, Prince Albert and Duck Lake. Both hockey tournaments, the Purolator Cup (Bantam Championship) held at Yorkton and the Swift Current Midget Hockey Tournament, attracted teams from Western Canada. Both Swift Current and Yorkton have excellent arenas (agriplexes) capable of accommodating large competitions. As well many of the participants are accompanied by coaches and the impact on local accommodation is quite significant.

The Sask. '60 is a unique event that began 8 years ago as a "ski rally" for Saskatoon's Nordic Ski Club. It has grown to attract as many as 800 participants. Unfortunately, the host community, Duck Lake, receives virtually no economic impact from the event as hotels in Saskatoon/Prince Albert are utilized. The event receives limited promotion and as a result participants are almost entirely from Saskatchewan.

The National Figure Skating Championships held in Regina (the "Nationals") was a major 'coup' for the City of Regina and the local figure skating club. This is a nationally televised event that has never been hosted in Saskatchewan. The resulting participation and attendance was drawn from throughout Canada from New Brunswick to British Columbia.

Somewhat akin to the "Nationals", the Mixed Curling Championship held at Prince Albert was an excellent example of what volunteer committees can do in hosting truly successful events. Almost all of the organization for this event occurred locally in Prince Albert. Out-of-province visitors interviewed stated that "it was one of the best finals we have been to". Over 1,000 people attended the event.

Themed Events

For want of a better term we have lumped large events based on a singular theme such as agricultural shows under the classification of themed events. Our surveys included the Western Canadian Agribition, the Western Farm Progress Show, Mexabition and the Air Show/Fair held at Moose Jaw. Agribition is the largest themed event held in Saskatchewan, with an attendance of 150,000 people requiring virtually every hotel room within a 50 mile radius of Regina and is also one of the most successful livestock/breeders shows held in North America. It is a relatively new event having been developed over the last 15 years. The success of the event has been one of the principal contributors to the expansion and modernization of facilities at the Regina Exhibition Association grounds. Saskatchewan's largest indoor rodeo (up to 30,000 visitors) is also held in conjunction with Agribition along with

Mexabition. At one time Mexabition was the principal attractor but with the success of Agribition it eventually eclipsed Mexabition and absorbed it. This show is only one-third the size of Agribition. Saskatoon also hosts a Mexabition which is sponsored in conjunction with Saskatchewan Agriculture.

Although not as large as Agribition (attendance 40,000), the Western Farm Progress Show has also been successful. Whereas Agribition is themed around livestock, the Western Farm Progress Show is themed around agricultural machinery and attracts international visitors.

This year a different approach was taken towards Moose Jaw's Air Show. It was organized as an Air Fair over a number of days as opposed to a single day event. Previously the Show was held on Sunday and, as a result, there was virtually no impact on Moose Jaw. There was also greater programming which included air races, air show, rodeo and air racing. This year's event attracted in excess of 30,000 visitors. In the past the Air Show has attracted as many as 100,000 visitors. The Canadian Forces Air Base is one of the principal organizers for the event. However the feasibility of creating a permanent executive to direct the event's development is being considered.

Arts and Crafts Events

Saskatchewan's handcrafts industry is largely characterized by pottery and woodcrafts. We selected three events of this nature to be included in our survey: Sundog, Bazart and the Saskatchewan Handcraft Festival. Sundog is the largest craft fair of the year held in Saskatoon. The two-day event features the works of potters, painters, glassmakers, and wood crafters drawn from

throughout Saskatchewan and attracts less than 10,000 visitors and participants. This was the first year the crafts exhibition was held in Centennial Auditorium. In previous years space had become a problem at Saskatoon's exhibition grounds.

Bazart is an outdoor annual one-day arts and crafts sale held in Regina with the co-operation of the Norman MacKenzie Art Gallery. Up to 100 crafts people participate in the show. Approximately 10,000 participants and visitors are attracted to the show.

The Saskatchewan Handcraft Festival, Saskatchewan's major handcraft fair, is held annually at Battleford. The "Battlefords" actually hosted three major events within a two week period: The Handcraft Festival, Summer Games and Northwest Territorial Days Exhibition. The Handcraft Festival is a three day exhibition, sale and demonstration. An estimated 22,000 people attend the event.

All three events are not really promoted as tourism attractions. In essence they are really commercial events for the participating artists. As a result emphasis focusses on the participants as opposed to attracting visitors.

Fairs

We chose only one fair for our survey, the Regina Exhibition Association's Buffalo Days. This is Saskatchewan's oldest, largest and most successful fair. It has grown to an eight-day event. Attendance of 230,000 to 300,000 people has been relatively stable over the last few years. Existing trends suggest that country or community fairs appear to be declining

in popularity. However Buffalo Days has also been able to stay "current" in its programming of exhibits and entertainment.

Novelty Events

Unfortunately, scheduling did not permit surveys of some of the more novel events such as Wynyard's Chicken Chariot Races. Generally, Saskatchewan has yet to develop a large novelty event and of the few that were identified attendance did not exceed 10,000.

A total of two "other" or "miscellaneous" events were surveyed. These two events, Battleford's "Those Were the Days" and Saskatoon's Heritage Bus Tours, could really not be characterized as novelty events in the same fashion as chicken chariot races or tractor pulls.

"Those Were the Days" is sponsored by the North Battleford branch of the Western Development Museum. This is not unlike Manitoba's Thresherman's Reunion which is sponsored and organized by a local museum and attracts 40,000 visitors. The general theme is period costuming surrounding an "old days were fun days" concept. A tent pavilion provides food service and the event is linked to the museum and townsite grounds. This two-day event attracts approximately 3,000 visitors.

Heritage Bus Tours are sponsored by the Saskatoon Heritage Society and a bus tour of heritage buildings of historical and architectural interest. Just under 700 people went on the tours during 1983 with an average group size of 14 people. Charters or bus tours account for one-third of the attendance.

Native Events

There are a series of pow wows held throughout Western Canada and the northwestern United States. Somewhat like rodeos there is a pow wow circuit attracting participants to several of the events along with their families. Concession operators also follow the "circuit". We selected the Standing Buffalo Pow Wow for our survey. Unfortunately Pow Wows are only promoted within the native community. A major pow wow attracting dancers and competitors from throughout the centre of North America could be a significant event such as in the case of the World Assembly of First Nations. Less than 1,000 people were estimated as attending the Standing Buffalo Pow Wow.

5.0 MARKET CHARACTERISTICS FOR SASKATCHEWAN EVENTS

5.1 Catchment Area for Events

Regarding the catchment or market area for the events surveyed we have segmented the market for each event as follows:

. Local and Regional Market

- includes attendance from the host community and persons travelling 50 miles or under to the event.

. Tourism Market

- includes those persons travelling 50 miles or greater to attend the event from Saskatchewan and out-of-province destinations.

Local and Regional Market

Table 4.0 indicates the distribution of attendance between local and non-local attendance at each event and for categories of events. The average for all 26 events surveyed indicates that only 38.1% of attendance is drawn from the host community. Rodeos and horse shows would appear to be least dependent upon the home or community market. However this conclusion must be tempered by the fact that the Craven or Big Valley rodeo events really don't have a local market as the rodeo grounds are located just outside of Craven and more correctly Regina-Craven would be the local market. However in the case of themed events, they clearly were the least dependent upon the local market. Only 7.3% of the total attendance at the Western Farm Progress Show was drawn from the city of Regina. Mosaic had the highest reliance upon the local market with 90.5% of the people surveyed coming from the city of

TABLE 4.0

Local, Regional and Tourism Markets

Events	Attendance	Sample	Local and Regional Market						Tourism Market			
					Regional Attendance				Tourism Attendance			
			Total Local Attendance		0-15 Miles	15-30 Miles	Total Reg. Attendance		30-150 Miles	>150 Miles	Total Tourism Attendance	
		#	#	%	#	#	#	%	#	#	#	%
Festivals												
Big Valley Jamboree	50,000	207	35	16.9	0	41	41	19.8	56	75	131	63.3
Folkfest	25,000	300	230	76.7	3	12	15	5.0	18	37	55	18.3
Mosaic	25,000	42	38	90.5	0	2	2	4.8	1	1	2	4.8
Moose Jaw Bandfest	26,000	33	16	48.5	0	12	12	36.4	1	4	5	15.2
Optimist Bandfest	4,000	54	21	38.9	2	4	6	11.1	21	6	27	50.0
Yorkton Filmfest	100	27	9	33.3	0	0	0	0.0	11	7	18	66.7
Total	130,100	663	349	52.6	5	71	76	11.5	108	130	238	35.9
Rodeos												
Big Valley (Fall '83)	40,000	262	12	4.6	40	79	118	45.0	67	65	132	50.4
Big Valley (Spring '84)	25,000	61	37	60.7	0	4	4	6.6	12	8	21	32.8
Humboldt (Indoor)	6,000	22	11	50.0	2	3	5	22.7	4	2	67	27.3
Regina Horse Show	10,000	50	23	46.0	0	6	6	12.0	6	15	21	42.0
Total	81,000	395	83	21.0	42	92	133	33.7	89	90	179	45.3
Sports												
Yorkton Hockey Tourn.	15,000	42	32	76.2	0	0	0	0.0	2	8	10	23.8
S. C. Hockey Tourn.	14,000	135	45	33.3	1	5	6	4.4	13	71	84	62.2
Skate Canada	20,000	103	40	38.8	0	6	6	5.8	20	37	57	55.3
Sask. '60	900	15	6	40.5	0	3	3	20.0	2	4	6	40.0
P. A. Mixed Curling	1,000	92	63	68.5	1	5	6	6.5	2	21	23	25.0
Total	50,900	387	186	48.1	2	19	21	5.4	39	141	180	46.5
Themed												
Agribition	150,000	596	133	22.3	5	80	5	14.3	189	189	378	63.4
Watrn. Farm Prog. Show	40,000	151	11	7.3	3	17	0	13.2	61	59	120	79.5
Mexibition	50,000	478	152	31.8	16	99	5	24.1	167	38	205	42.9
Moose Jaw Air Show	30,000	400	184	46.0	3	34	7	9.3	78	101	179	44.8
Total	270,000	1,625	480	29.5	27	230	17	15.8	495	387	882	54.3
Arts/Crafts												
Sundog	8.000	50	43	86.0	1	1	2	4.0	3	2	5	10.0
Bazart	10,000	48	38	79.2	1	1	2	4.2	2	6	8	16.7
Sask. Handcraft Fest.	22,000	64	13	20.3	0	6	6	9.4	28	17	45	70.0
Total	40,000	162	94	58.0	2	8	10	6.2	33	25	58	35.8
Fairs												
Buffalo Days	240,000	200	115	57.5	1	23	24	12.0	31	30	61	30.5
Novelty (Other)												
Those Were The Days	2,600	71	32	45.1	0	6	6	8.5	11	22	33	46.4
Heritage Bus Tours	690	7	3	42.9	0	0	0	0.0	0	4	4	57.2
Total	3,290	78	35	44.9	0	6	6	7.7	11	26	37	47.4
Native												
Fort Qu'Appelle Pow-Wow	1,000	25	4	16.0	1	1	2	8.0	13	16	29	76.0
TOTALS	816,290	3,535	1,346	38.1	80	549	329	15.0	809	844	1,653	46.9

Regina. However, our sample was very small for this event. At the same time, Folkfest, a similar event, also had a very high local attendance at 76.7% which may be characteristic of cultural events held in Saskatchewan.

Table 4.0 also indicates the distribution of people attending the events who are not from the host community and have travelled anywhere from 1 to 50 miles to attend the event, which we have defined as regional attendance. Regional attendance accounts for only 25% of attendance at events from outside the host community. The Moose Jaw Band Festival and Big Valley rodeo recorded the highest regional attendance. However, as was explained previously, the city of Regina is a key market for events held at the rodeo grounds located near Craven.

Tourism Markets

One of the principal objectives for undertaking this study was to determine the tourism potential associated with Saskatchewan events. What portion of the estimated 1.6 million people attending Saskatchewan events were actuallly tourists? Although events such as Buffalo Days and Agribition have high attendance what impact do they have in inducing tourism travel? As a result we have separated out that segment of attendance that originates from fifty miles or more away from the event, which defines tourism travel.

Table 4.0 indicates that of the 26 events sampled tourism travel accounts for slightly less than 50% of origin of attendance at events. Themed events emerged as having the greatest impact upon tourism travel as 54.3% of their attendance was drawn from persons living 50 miles or more away. The Western Farm Progress Show was

particularly impressive as a tourism travel motivator with 79.5% of its attendance being drawn from tourism markets. There were six other events where tourism attendance exceeded 60% of total attendance -- the Big Valley Jamboree (63.3%), Yorkton Film Festival (66.7%), Swift Current Hockey Tournament (62.2%), Agribition (63.4%), Fort Qu'Appelle Pow Wow (76.0%) and Saskatchewan Handcraft Festival (70.0%). However, some of these events such as the Pow Wow (1,000 people) and Yorkton's Film Festival (100 people) are relatively small events. As well in some cases (Pow Wow) the sample was too small to draw a strong conclusion.

Interestingly although Saskatchewan's largest and oldest event, Buffalo Days only has a comparatively modest tourism travel impact as just over 30% of its attendance is drawn from travel markets. Saskatchewan's two largest cultural events, Folkfest and Mosaic had the poorest impact on travel markets with only 18.3% and 4.8%, respectively, of their attendance resulting from this market. However, they were not intended to be tourism attractors.

Table 5.0 provides greater detail as to the origin of tourism travel to these events. Saskatchewan resident travel accounts for 73.9% of tourism to the events sampled. Alberta is clearly the principal out-of-province market accounting for 10.3% of total travel attendance. This was particularly true of sports events where Alberta residents accounted for 35.7% of attendance. Sports events were also the least dependent upon the Saskatchewan travel market. In particular, the Swift Current Hockey tournament generated significant travel from Alberta accounting for 60.7% of tourism travel to the event. Themed events generated the greatest international travel although a relatively small sample, the Fort Qu'Appelle Pow Wow generated relatively significant travel from the U.S.A. Table 6.0 indicates that Montana and North Dakota are principal international markets for tourism travel to Saskatchewan events.

TABLE 5.0

Origins of Tourism Travel Markets

Events	# of Tourists at Events	% Tourists at Events	SASK.		CANADA										INTERNATIONAL			
			Sask.		Alta.		Man.		Ont.		B.C.		Other Can.		U.S.		Other Intl.	
			#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
1. Wstn. Farm Prog. Show	131	79.5	85	70.3	13	10.8	9	7.5	1	0.8	0	0.0	3	2.5	8	6.7	1	0.8
2. Fort Qu'Appelle Pow Wow	19	76.0	5	26.3	2	10.5	5	26.3	0	0.0	1	5.3	0	0.0	7	36.8	0	0.0
3. Sask. Handcraft Festival	58	70.0	44	97.8	1	2.2	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
4. Yorkton Film Festival	18	66.7	13	72.2	1	5.6	0	0.0	0	0.0	0	0.0	4	22.2	0	0.0	0	0.0
5. Agribition	378	63.4	303	80.2	23	6.1	32	8.5	5	1.3	0	0.0	0	0.0	11	2.9	2	0.5
6. Big Valley Jamboree	131	63.3	111	84.7	11	8.4	4	3.1	1	0.8	0	0.0	1	.8	1	.7	2	1.5
7. S. C. Hockey Tourn.	84	62.2	29	34.5	51	60.7	0	0.0	0	0.0	4	4.8	0	0.0	0	0.0	0	0.0
8. Heritage Bus Tours	4	57.1	0	0.0	1	25.0	0	0.0	1	25.0	1	25.0	0	0.0	0	0.0	1	25.0
9. National Figure Skating	57	55.5	26	45.6	9	15.8	3	5.3	11	19.3	6	10.5	1	1.8	0	0.0	0	0.0
10. B.V. Fall Rodeo ('83)	132	50.4	116	87.9	8	6.1	2	1.5	4	3.0	3	2.3	1	.8	0	0.0	2	1.5
11. Optimist Band Fest. (Regina)	27	50.0	24	92.3	1	3.9	0	0.0	0	0.0	0	0.0	0		2	7.7	0	0.0
12. Those Were the Days	33	46.4	21	63.6	2	6.1	2	6.1	3	9.1	2	6.1			1	3.0	2	6.1
13. Moose Jaw Air Show	179	44.8	118	65.9	14	7.8	11	6.2	8	4.5	6	3.4	7	3.9	9	5.0	6	3.4
14. Hexebition (Saskatoon)	205	42.9	193	94.2	4	2.0	3	1.5	1	0.0	1	0.5	1	.5	2	1.0	0	0.0
15. Regina Horse Show	21	42.0	8	38.1	10	47.6	2	9.5	1	0.0	0	0.0	4	4.8	0	0.0	0	0.0
16. Sask. '60	6	40.0	5	83.3	1	16.7	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
17. Big Valley Spring Roden	20	32.8	19	95.0	1	5.0	0	0.0	0	0.0	1	5.0	1	5.0	0	0.0	0	0.0
18. Buffalo Days (Regina)	61	30.5	48	78.7	4	6.6	1	1.6	3	4.9	1	1.6	0	0.0	3	4.9	1	1.6
19. Humboldt Indoor Rodeo	6	27.3	5	83.3	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
20. P. A. Mixed Curling Finals	23	25.0	9	39.1	1	4.3	4	17.4	1	4.3	0	0.0	7	30.4	1	4.4	0	0.0
21. Yorkton Purolator Cup	10	23.8	4	33.3	3	25.0	4	33.3	0	0.0	1	8.3	0	0.0	0	0.0	0	0.0
22. Folkfest	55	18.3	21	38.2	9	16.4	5	9.1	4	7.3	4	7.3	5	9.1	3	5.4	8	14.6
23. Bezert	8	16.7	6	75.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	1	12.5		
24. Moose Jaw Band Festival	5	15.2	4	80.0	0	0.0	0	0.0	0	0.0	0	0.0	1	20.0	0	0.0	0	
25. Sundog	5	10.0	5	100.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	
26. Mosaic	2	4.8	1	50.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	1	50.0	0	
	1,655	46.9	1,223	73.9	170	10.3	87	5.2	42	2.5	29	1.7	32	1.9	50	3.0	25	1.5

TABLE 6.0

Origins of International Visitation to Saskatchewan Events

U.S.A.	#	%
Montana	20	40.0
North Dakota	9	18.0
South Dakota	2	4.0
Minnesota	2	4.0
Nebraska	2	4.0
Other U.S.A.	15	30.0
. Oregon 1		
. Ohio 1		100.0
. Illinois 1		
. Arizona 1		
. Colorado 1		
. Kansas 1		
. California 1		
. New York 1		
. Penn. 1		
. Idaho 1		
. D. of C. 1		
. Other 4		
50		

International	#	%
Europe	8	32.0
Africa	8	28.0
United Kingdom	7	32.0
Asia	2	8.0
	25	100.0

5.2 Visitor Characteristics

Table 7.0 indicates some of the characteristics related to party size of people attending the events. The average for all events suggests that people do not like to go to events alone and are most often in a group of two people. Eighty percent of the people surveyed were attending the event with other people. The only exception to this are Battleford's "Those Were the Days" and Saskatoon's Heritage Bus Tours where 50% of the people were visiting the event alone.

Table 8.0 indicates that generally most people are visiting Saskatchewan events with family members. Even events with a business orientation such as Agribition and the Farm Progress Show received very little attendance with business associates. As a result Saskatchewan's events could largely be characterized as family events of little interest to business people. This is somewhat characteristic of the Saskatchewan travel market which is largely family orientated with the principal travel movitation being visiting friends and relatives.

Table 9.0 indicates that 60% of the people surveyed at these events attend similar events. In the cases of Arts/Crafts and Sports events it suggests that people attend two or more events of this nature throughout the year. This is not surprising as sports programs or events occur over a season or year. Arts and Crafts are not viewed as single events but part of a series of events or shows that occur thorughout the year. However some events are unique in that they are "stand-alone" events where attendance is an annual or singular visit. Folkfest and Mosaic are viewed as annual events of which people will attend only once a year. This would suggest that it is only possible to host/stage one annual event. If Regina or Saskatoon were to host two major cultural events of a similar nature, for example a spring and fall Mosaic in Regina, attendance could become fragmented between the two as people would make their "annual" choice to attend one or the other but likely not both.

TABLE 7.0

Party Size Characteristics Associated with Attendance at Saskatchewan Events

Event Category	Attending Event Alone		GROUP ATTENDANCE: Group of 2		Group of 3		Group of 4		Group of 5		Group of 5+		Avg. Party Size
	#	%	#	%	#	%	#	%	#	%	#	%	
Festivals													
Big Valley Jamboree	12	5.8	62	31.8	24	12.3	45	23.1	15	7.7	49	25.1	3.8
Folkfest	18	6.0	105	37.2	65	23.1	56	19.9	28	9.9	28	9.9	3.3
Mosaic	0	0.0	8	20.0	4	10.0	14	35.0	4	10.0	10	25.0	4.1
Moose Jaw Bandfest	5	15.2	9	32.1	5	17.9	5	17.9	2	7.1	7	25.0	3.8
Optimist Bandfest	11	20.4	5	11.9	6	14.3	5	11.9	1	2.4	25	59.5	4.8
Yorkton Filmfest	12	44.4	7	46.7	1	6.7	3	20.0	0	0.0	4	26.7	3.5
Total	58	8.7	196	32.6	105	17.4	128	21.3	50	8.3	123	20.4	3.6
Rodeos													
Big Valley (Fall '83)	29	11.1	101	43.4	30	12.9	45	19.3	21	9.0	35	15.5	3.4
Big Valley (Spr. '84)	4	6.6	17	29.8	12	21.1	10	17.5	5	8.8	13	22.8	3.7
Humboldt (Indoor)	1	4.5	4	19.1	9	42.9	2	9.5	1	4.8	5	23.8	3.7
Regina Horse Show	7	14.0	19	44.2	9	20.9	6	14.0	4	9.3	5	11.6	3.2
Total	41	10.4	141	39.8	60	17.0	63	17.8	31	8.8	59	16.7	3.5
Sports													
Yorkton Hockey Tourn.	10	23.8	6	18.8	9	28.1	9	28.1	4	12.5	4	12.5	3.7
S. C. Hockey Tourn.	28	20.7	44	41.1	26	24.3	17	15.9	2	1.9	18	15.8	3.3
National Figure Skating	10	9.7	32	34.4	25	26.9	14	15.1	8	8.6	14	15.1	3.4
Sask. 60	4	26.7	5	45.5	2	18.2	3	27.3	1	9.1	0	0.0	3.0
P. A. Mixed Curling	31	33.7	32	52.5	7	11.5	11	18.0	1	1.6	10	16.4	3.2
Total	83	21.3	119	39.1	69	22.7	54	17.8	16	5.3	46	15.1	3.3
Themed													
Agribition	104	17.5	229	46.5	92	18.7	108	22.0	31	6.3	32	6.5	3.1
Wstrn. Farm Prog. Show	13	8.6	63	45.7	22	15.9	35	25.4	10	7.3	8	5.8	3.1
Mexabition	101	21.4	202	54.5	65	17.5	76	20.5	10	2.7	18	4.9	2.9
Moose Jaw Air Show	72	18.0	90	27.4	68	20.7	73	22.3	29	8.8	68	20.7	3.7
Total	290	17.9	584	43.9	247	18.6	292	22.0	80	6.0	126	9.5	3.2
Arts/Crafts													
Sundog	5	10.0	29	64.4	9	20.0	4	8.9	1	2.2	2	4.4	2.6
Bazart	4	8.3	22	50.0	11	25.0	5	11.4	2	4.6	4	9.1	3.0
Sask. Handcraft Festival	7	10.9	28	49.1	13	22.8	10	17.5	3	5.3	3	5.3	2.9
Total	16	9.9	79	54.1	33	22.6	19	13.0	6	4.1	9	6.2	2.9
Fairs													
Buffalo Days	24	12.0	81	46.0	32	18.2	34	19.3	11	6.3	18	10.2	3.2
Novelty (Other)													
Those Were The Days	36	51.4	9	26.5	6	17.7	10	29.4	3	8.8	6	17.7	3.7
Heritage Bus Tours	3	42.9	2	50.0	2	50.0	0	0.0	0	0.0	0	0.0	2.5
Total	39	50.7	11	29.0	8	21.1	10	26.3	3	7.9	6	15.8	3.6
Native													
Fort Qu'Appelle Pow-Wow	0	0.0	5	23.8	0	0.0	3	14.3	1	4.8	12	57.1	4.7
TOTALS	551	15.6	1,216	40.9	554	18.7	603	20.3	198	6.7	399	13.4	3.3

TABLE 8.0

Attendance with Family, Friends and Business Associates at Saskatchewan Events

Event Category	Attendance With: Family #	Family %	Friends #	Friends %	Family/Friends #	Family/Friends %	Business Assoc. #	Business Assoc. %
Festivals								
Big Valley Jamboree	75	39.5	64	33.7	48	25.3	3	1.6
Folkfest	122	43.3	88	31.2	68	24.1	4	1.4
Mosaic	18	43.9	14	34.2	9	22.0	0	0.0
Moose Jaw Bandfest	11	39.3	7	25.0	8	28.6	2	7.1
Optimist Bandfest	14	33.3	7	16.7	20	47.6	1	2.4
Yorkton Filmfest	5	33.3	3	20.0	1	6.7	6	40.0
Total	245	41.0	183	30.6	154	25.8	16	2.7
Rodeos								
Big Valley (Fall '83)	165	70.8	41	17.6	27	11.6	0	0.0
Big Valley (Spr. '84)	23	40.4	13	22.8	20	35.1	1	1.8
Humboldt (Indoor)	14	70.0	1	5.0	5	25.0	0	0.0
Regina Horse Show	28	65.1	8	18.6	7	16.3	0	0.0
Total	230	65.2	63	17.9	59	16.7	1	1.3
Sports								
Yorkton Hockey Tourn.	19	59.4	5	15.6	8	25.0	0	0.0
S. C. Hockey Tourn.	68	62.4	19	17.4	15	13.8	7	6.4
National Figure Skating	51	54.8	16	17.2	18	19.4	8	8.6
Sask. 60	3	27.3	4	36.4	4	36.4	0	0.0
P. A. Mixed Curling	34	54.0	13	20.6	9	14.3	7	1.1
Total	175	56.8	57	18.5	54	17.5	22	7.1
Themed								
Agribition	322	65.5	92	18.7	58	11.8	20	4.1
Wstrn. Farm Prog. Show	99	72.3	13	9.5	19	13.9	6	4.4
Mexabition	248	66.9	64	17.3	46	12.4	13	3.5
Moose Jaw Air Show	135	41.2	118	36.0	60	18.3	15	4.6
Total	804	60.5	287	21.6	103	13.8	54	4.1
Arts/Crafts								
Sundog	29	64.4	14	31.1	2	4.4	0	0.0
Bazart	26	57.8	11	24.4	5	11.1	3	6.7
Sask. Handcraft Festival	44	77.2	10	17.5	3	5.3	0	0.0
Total	99	67.4	35	23.8	10	6.8	3	2.0
Fairs								
Buffalo Days	107	60.8	48	27.3	19	10.8	2	1.1
Novelty (Other)								
Those Were The Days	24	70.6	5	14.7	5	14.7	0	0.0
Heritage Bus Tours	3	75.0	1	25.0	0	0.0	0	0.0
Total	27	71.1	6	15.8	5	13.2	0	0.0
Native								
Fort Qu'Appelle Pow-Wow	17	81.0	2	9.5	1	4.8	1	4.8
TOTALS	1,704	57.4	681	22.9	485	16.3	99	3.3

TABLE 9.0

Attendance at Similar Events

Event Category	Yes		No	
	#	%	#	%
Festivals				
Big Valley Jamboree	78	38.8	123	61.2
Folkfest	112	37.3	188	62.7
Mosaic	15	35.7	27	64.3
Moose Jaw Bandfest	16	69.6	7	30.4
Optimist Bandfest	42	79.3	11	20.8
Yorkton Filmfest	11	40.7	16	59.3
Total	274	42.4	372	57.6
Rodeos				
Big Valley (Fall '83)	153	58.4	109	41.6
Big Valley (Spr. '84)	37	60.7	24	39.3
Humboldt (Indoor)	16	72.7	6	27.3
Regina Horse Show	44	88.0	6	12.0
Total	250	63.3	145	36.7
Sports				
Yorkton Hockey Tourn.	35	83.3	7	16.7
S. C. Hockey Tourn.	89	65.9	46	34.1
National Figure Skating	69	67.0	34	33.0
Sask. 60	7	46.7	8	53.3
P. A. Mixed Curling	70	76.1	22	23.9
Total	270	69.8	117	30.2
Themed				
Agribition	440	73.8	156	26.2
Wstrn. Farm Prog. Show	135	80.4	16	10.6
Mexabition	98	64.5	54	35.5
Moose Jaw Air Show	196	45.8	232	54.2
Total	869	65.5	458	34.5
Arts/Crafts				
Sundog	38	76.0	12	24.0
Bazart	36	75.0	12	25.0
Sask. Handcraft Festival	40	62.5	24	37.5
Total	114	70.4	48	29.6
Fairs				
Buffalo Days	108	54.0	92	46.0
Novelty (Other)				
Those Were The Days	26	40.6	38	59.4
Heritage Bus Tours	5	71.4	2	28.6
Total	31	43.7	40	56.3
Native				
Fort Qu'Appelle Pow-Wow	12	54.6	10	45.5
TOTALS	1,928	60.1	1,282	39.9

5.3 Market Support and Visitor Impressions

Table 10.0 indicates visitor characteristics in terms of first time attendance, repeat attendance in the future and the encouragement of others to attend the event in the future. Generally most of the events surveyed are established events. As a result 60% of the visitors surveyed indicated that they had attended the event in previous years. Table 11.0 provides an indication as to the extent of historical attendance at these events. Regina's Buffalo Days clearly emerges as Saskatchewan's most successful event in holding its historical attendance. Themed events and sports events had over 50% of their visitors who had attended the event for four or more years. The rodeos and horse shows had the lowest number of people who had attended the event for a number of years. However the reason for this is that the two rodeos held at Craven are relatively young events.

Referring again to Table 10.0 it appears that people were relatively satisfied with their experiences at the events as over 90% would return again and 87.5% would encourage others to attend the event.

Visitor Impressions - Local

Regarding persons visiting the events who were residents of the host community, questions were asked regarding the impressions of the event. Virtually eveyone surveyed felt that tourism visitation to the event and their community was seen to be beneficial particularly for community facilities. Almost 98% of the local people surveyed felt the event to be worthwhile and 80.7% would encourage others to attend. Rodeos and horse shows recorded the lowest percentage (62.2%) of people who would encourage others to attend the event.

TABLE 10.0

Market Support for Saskatchewan Events

Event Category	Attendance for the First Time				Would You Return				Would You Encourage Others to Attend The Event			
	Yes		No		Yes		No		Yes		No	
	#	%	#	%	#	%	#	%	#	%	#	%
Festivals												
Big Valley Jamboree	164	79.2	43	20.8	152	92.7	8	4.9	155	94.5	9	5.5
Folkfest	142	47.5	157	52.5	138	97.2	2	1.4	141	99.3	1	0.7
Mosaic	7	16.7	35	83.3	7	100.0	0	0.0	7	100.0	0	0.0
Moose Jaw Bandfest	7	21.2	26	78.8	6	85.7	1	14.3	6	85.7	1	14.3
Optimist Bandfest	28	51.9	26	48.2	25	89.3	3	10.7	26	48.2	28	51.8
Yorkton Filmfest	15	55.6	12	44.4	14	93.3	0	0.0	14	93.3	1	6.7
Total	363	54.8	299	45.2	342	94.2	14	3.9	349	89.7	40	10.3
Rodeos												
Big Valley (Fall '83)	141	53.8	121	46.2	126	89.4	1	1.7	117	83.0	24	17.0
Big Valley (Spr. '84)	27	44.3	34	55.7	25	92.6	0	0.0	25	92.6	2	7.4
Humboldt (Indoor)	21	95.5	1	4.5	21	100.0	0	0.0	19	86.4	3	13.6
Regina Horse Show	8	16.0	42	84.0	7	87.5	0	0.0	7	70.0	3	30.0
Total	197	49.9	198	50.1	179	90.9	1	1.5	168	84.0	32	16.0
Sports												
Yorkton Hockey Tourn.	37	88.1	5	11.9	34	91.9	1	2.7	34	97.1	1	2.9
S. C. Hockey Tourn.	63	46.7	72	53.3	63	100.0	0	0.0	61	93.9	4	6.1
National Figure Skating	60	58.3	43	41.7	58	96.7	2	3.3	59	98.3	1	1.7
Sask. 60	8	53.3	7	46.7	8	100.0	0	0.0	8	100.0	0	0.0
P. A. Mixed Curling	70	76.1	22	23.9	65	92.9	3	4.3	65	92.9	5	7.1
Total	238	61.5	149	38.5	228	95.8	6	2.5	227	95.4	11	4.6
Themed												
Agribition	112	18.8	484	81.2	99	88.4	8	7.4	98	87.5	14	12.5
Wstrn. Farm Prog. Show	46	30.5	105	69.5	39	84.8	6	13.0	42	91.3	4	8.7
Mexabition	127	26.9	345	73.1	109	85.8	13	10.2	95	74.8	32	25.2
Moose Jaw Air Show	172	45.1	209	54.9	151	87.8	9	5.2	144	83.7	28	16.3
Total	457	28.6	1,143	71.4	398	87.1	36	7.9	379	82.9	78	17.1
Arts/Crafts												
Sundog	19	38.0	31	62.0	18	94.7	1	5.3	18	94.7	1	5.3
Bazart	18	37.5	30	62.5	18	100.0	0	0.0	17	94.4	1	5.6
Sask. Handcraft Festival	27	42.2	37	57.8	26	96.3	0	0.0	27	100.0	0	0.0
Total	64	39.5	98	60.5	62	96.9	1	1.6	62	96.9	2	3.1
Fairs												
Buffalo Days	24	12.0	176	88.0	19	79.2	2	8.3	16	66.7	8	33.3
Novelty (Other)												
Those Were The Days	28	42.4	38	57.6	23	82.1	6	21.4	26	83.9	5	16.1
Heritage Bus Tours	7	100.0	0	0.0	7	100.0	0	0.0	0	0.0	0	0.0
Total	35	48.0	38	52.0	30	85.7	6	17.1	26	83.9	5	16.1
Native												
Fort Qu'Appelle Pow-Wow	9	36.0	16	64.0	7	77.8	1	11.1	7	87.5	1	12.5
TOTALS	1,387	39.4	2,117	60.4	1,24[illegible]	91.2	67	4.8	1,234	87.5	177	12.5

TABLE 11.0

Historical Attendance at Saskatchewan Events

Event Category	Previous Years Attendance: 1 Year #	1 Year %	2 Years #	2 Years %	3 Years #	3 Years %	4+ Years #	4+ Years %
Festivals								
Big Valley Jamboree	43	100.0	0	0.0	0	0.0	0	0.0
Folkfest	64	40.3	42	26.8	30	19.1	21	13.4
Mosaic	8	22.9	5	14.3	7	20.0	15	42.9
Moose Jaw Bandfest	1	3.8	0	0.0	4	15.4	21	80.8
Optimist Bandfest	8	30.8	10	38.5	4	15.4	3	11.5
Yorkton Filmfest	3	25.0	2	16.7	3	25.0	4	33.3
Total	127	42.5	59	19.7	48	16.1	64	21.4
Rodeos								
Big Valley (Fall '83)	55	45.5	2	1.7	0	0.0	0	0.0
Big Valley (Spr. '84)	19	55.9	8	23.5	6	17.7	1	2.9
Humboldt (Indoor)	1	100.0	0	0.0	0	0.0	0	0.0
Regina Horse Show	7	16.7	4	9.5	1	2.4	30	71.4
Total	82	41.4	14	7.1	7	3.5	31	15.7
Sports								
Yorkton Hockey Tourn.	4	80.0	1	20.0	0	0.0	0	0.0
S. C. Hockey Tourn.	2	2.8	17	23.6	10	13.9	43	59.7
National Figure Skating	4	9.3	5	11.6	7	16.3	27	62.8
Sask. 60	0	0.0	1	14.3	2	28.6	4	57.1
P. A. Mixed Curling	14	63.6	1	4.5	0	0.0	7	31.8
Total	24	16.1	25	16.8	19	12.8	81	54.4
Themed								
Agribition	57	11.8	52	10.7	52	10.8	323	66.7
Wstrn. Farm Prog. Show	20	19.1	21	20.0	14	13.3	50	47.6
Mexabition	53	15.4	56	16.2	50	14.5	186	53.9
Moose Jaw Air Show	34	16.3	47	22.5	43	20.6	85	40.7
Total	164	14.4	176	15.4	159	13.9	644	56.4
Arts/Crafts								
Sundog	5	16.1	8	25.8	5	16.1	13	41.9
Bazart	5	16.7	5	16.7	8	26.7	12	40.0
Sask. Handcraft Festival	6	16.2	8	21.6	7	18.9	16	43.2
Total	16	16.3	21	21.4	20	20.4	41	41.8
Fairs								
Buffalo Days	7	4.0	9	5.1	16	9.1	143	81.3
Novelty (Other)								
Those Were The Days	2	5.3	7	18.4	8	21.1	11	29.0
Heritage Bus Tours	0	0.0	0	0.0	0	0.0	0	0.0
Total	2	5.3	7	18.4	8	21.1	11	29.0
Native								
Fort Qu'Appelle Pow-Wow	424	12.5	3	18.8	1	6.3	7	43.8
TOTALS	1,704	20.0	314	14.8	278	13.1	1,022	48.3

TABLE 12.0

Impressions of Local Persons Attending the Events

Event Category	Is the Event Considered Worthwhile: Yes #	Yes %	No #	No %	Would You Encourage Others to Attend: Yes #	Yes %	No #	No %	Would You Encourage Others to Attend The Event: Friends	Rel.	Bus.
Festivals											
Big Valley Jamboree	35		0		24		11		22	15	15
Folkfest	228		2		224		6		214	186	170
Mosaic	38		0		36		2		31	21	20
Moose Jaw Bandfest	16		0		12		4		12	6	4
Optimist Bandfest	21		0		11		10		9	7	5
Yorkton Filmfest	9		0		5		4		5	5	5
Total	347	99.4	2	2.6	312	89.3	37	10.7	293	240	219
Rodeos											
Big Valley (Fall '83)	12		0		7		5		6	5	3
Big Valley (Spr. '84)	37		0		25		12		24	20	15
Humboldt (Indoor)	10		1		7		3		7	7	7
Regina Horse Show	22		1		12		11		10	8	5
Total	81	97.6	2	2.4	51	62.2	31	37.8	47	40	30
Sports											
Yorkton Hockey Tourn.	30		0		20		10		18	13	11
S. C. Hockey Tourn.	45		0		42		2		39	28	26
National Figure Skating	40		0		24		16		24	14	15
Sask. 60	0		0		0		0		0	0	0
P. A. Mixed Curling	61		2		47		16		44	28	31
Total	176	98.9	2		133	75.1	44	24.9	125	83	83
Themed											
Agribition	131		2		104		29		78	70	48
Wstrn. Farm Prog. Show	11		0		6		5		6	3	3
Mexabition	152		0		94		58		70	60	33
Moose Jaw Air Show	178		2		175		6		147	121	74
Total	472	99.4	4	.6	379	79.5	98	80.5	301	254	158
Arts/Crafts											
Sundog	42		1		31		12		30	22	18
Bazart	38		0		29		9		25	19	14
Sask. Handcraft Festival	11		0		9		4		6	6	4
Total	91	96.8	1	1.1	69	73.4	25	26.6	61	47	36
Fairs											
Buffalo Days	108	93.9	5	4.4	95	82.6	20	17.4	92	72	47
Novelty (Other)											
Those Were The Days	25		5		32		0		25	25	16
Heritage Bus Tours	3		0		1		2		1	1	1
Total	28	80.0	5	14.3	33	94.3	2	95.7	26	26	17
Native											
Fort Qu'Appelle Pow-Wow	4	100.0	0		4	100.0	0	100.0	4	4	4
TOTALS	1,307	97.9	21	1.6	1,076	80.7	257	19.3	949	765	594
									41.1%	33.7%	25.7%

However they would in about 75% of the cases encourage friends and relatives to attend the event and only 25% in the case of business associates. Again Saskatchewan's events could be characterized as non-business in orientation.

Visitor Impressions - Non-Local

Regarding visitor impressions of non-local people, Table 13 indicates that 45% of the people surveyed felt that improvements were necessary to make their visit to the event more enjoyable. This was particularly true for festivals such as Mosaic and Folkfest where there is a strong indication that facilities should be improved and in particular expanded to accommodate existing visitors. All three of the events held at the Bosco Homes Craven site (Big Valley Jamboree, Spring and Fall Rodeos) would appear to require facility improvements as in all three cases over 50% of the non-local visitors felt improvements were necessary. If these improvements are not made it could act as a constraint to further expansion or in holding existing visitors to these events on an annual basis.

5.4 Conclusions

Catchment Area for Events

Of the 26 events surveyed, the average attendance for all events would suggest that they are clearly not local events with only local and regional appeal. Only 38.1% of the attendance was drawn from the host community. There were some exceptions to this such as the province's two largest cultural festivals, Mosaic and Folkfest. These were local events with local attendance accounting for 90.5% of Mosaic's total attendance and 76.7% of

TABLE 13.0

Impressions of Non-Local Persons Attending the Events

Event Category	Are Improvements Required at the Event: Yes #	Yes %	No #	No %	No. Ans. #	No. Ans. %	Expand Event	Improve Facilities	Improve Services	Other
Festivals										
Big Valley Jamboree	113	54.6	89	43.0	5	2.4	19	97	23	63
Folkfest	222	74.0	78	26.0	0	0.0	118	28	41	104
Mosaic	25	89.5	14	35.9	3	7.1	19	3	1	8
Moose Jaw Bandfest	7	22.6	24	77.4	0	0.0	0	2	0	0
Optimist Bandfest	12	23.5	39	76.5	0	0.0	2	4	0	6
Yorkton Filmfest	14	43.8	17	54.8	1	3.1	1	3	1	10
Total	393	59.3	261	39.9	9	1.4	159	137	66	191
Rodeos										
Big Valley (Fall '83)	144	55.0	114	44.2	4	1.5	9	42	23	76
Big Valley (Spr. '84)	30	51.7	28	48.3	0	0.0	2	8	4	16
Humboldt (Indoor)	6	22.2	14	70.0	7	25.9	1	0	0	5
Regina Horse Show	16	32.0	33	67.4	1	2.0	6	2	1	10
Total	196	33.7	189	49.1	12	3.0	18	52	28	107
Sports										
Yorkton Hockey Tourn.	15	35.7	27	64.3	0	0.0	1	0	2	0
S. C. Hockey Tourn.	29	21.5	102	77.9	4	3.0	9	8	14	5
National Figure Skating	36	35.0	67	65.1	0	0.0	0	12	14	0
Sask. 60	6	40.0	9	60.0	0	0.0	0	3	2	1
P. A. Mixed Curling	31	33.7	61	66.3	0	0.0	3	18	2	2
Total	117	30.2	266	69.5	4	1.0	13	41	34	8
Themed										
Agribition	241	40.4	351	59.3	4	.7	21	29	18	204
Wstrn. Farm Prog. Show	82	54.3	65	44.2	4	2.6	0	39	12	14
Mexabition	170	36.0	302	64.0	0	0.0	66	24	39	47
Moose Jaw Air Show	196	49.0	204	51.0	0	0.0	28	65	76	90
Total	689	42.6	922	57.2	8	.5	115	157	146	355
Arts/Crafts										
Sundog	32	64.0	17	34.7	1	2.0	7	5	2	21
Bazart	19	41.3	27	58.7	0	0.0	2	2	2	13
Sask. Handcraft Festival	22	34.4	41	65.1	1	1.6	6	2	4	13
Total	73	45.6	85	53.8	2	1.3	15	9	8	47
Fairs										
Buffalo Days	80	40.0	118	59.6	2	1.0	30	24	17	26
Novelty (Other)										
Those Were The Days	19	29.7	42	68.9	3	4.7	1	2	7	1
Heritage Bus Tours	4	57.1	3	42.9	0	0.0	1	0	1	2
Total	23	32.4	45	66.2	3	4.2	2	2	8	12
Native										
Fort Qu'Appelle Pow-Wow	9	39.1	8	47.1	6	26.1	1	3	7	4
TOTALS	1,580	44.9	1,894	54.5	46	1.3	353	425	313	750

Folkfest's attendance. With the exception of only a few events, most of the events surveyed could definitely be characterized as travel motivators as almost 50% of the people attending them travelled more than 50 miles. In the case of the Western Farm Progress Show 80% of its attendance was drawn from this market.

Although the events are inducing tourism travel, it is largely drawn from the Saskatchewan market. Saskatchewan accounted for 73.9% of total tourist travel to the 26 events surveyed. Alberta was the largest out-of-province market for Saskatchewan events, accounting for 10% of tourism travel, followed by Manitoba at half that amount. The United States was the third largest out-of-province market, but a relatively small one at only 3% of out-of-province travel. Montana and North Dakota accounted for 58% of U.S. travel visitation. Sporting events emerged as being the most successful in attracting out-of-province visitation.

Visitor Characteristics

Saskatchewan events were shown to be family oriented as almost 60% of the people attending the events did so with family members. Even events such as the Western Farm Progress Show and Agribition were regarded as family events.

Market Support and Visitor Impressions

Generally persons attending these events were satisfied with their experience at the events as over 90% would return again and 85% would encourage others to do so. However both event, facility and

service improvements are required as 44.9% of the people surveyed felt improvements were necessary. In eight of the 26 events surveyed over 50% of the people interviewed felt improvements were required at the event in terms of expanding the event, improving its facilities and services. These events were the three Big Valley events organized by Bosco Homes, Folkfest, Mosaic, the Western Farm Progress Show, Sundog and the Moose Jaw Air Show.

6.0 ECONOMIC IMPACT OF EVENTS

In this chapter we examine the economic significance of Saskatchewan events to both the local and provincial economies. Of particular importance is an assessment of their tourism impact and the role and importance of events in stimulating tourism travel and expenditure in Saskatchewan. We have examined the impact of the event itself in terms of the amount of expenditure at the event. Secondly we have examined tourism impact associated with the events. Then finally we determined the entire economic impact that results from the events.

6.1 Local Impact

In this instance we are only considering the expenditure generated at the event itself. In virtually all cases visitors, whether they are from the host community or tourists, made some expenditure at the event. In most cases a good portion of this expenditure finds its way back to the organizers of the event by way of concessions from food and beverage sales, admission fares to the events and other expenditures. Often this is the principal motive for holding the event. In the cases of Mosaic and Folkfest these events are a major source of revenue for various cultural clubs and associations. In other cases the event is not viewed as a "money-maker" but rather should cover the costs of hosting the event.

Table 14 indicates the average party expenditure and average per person expenditure at the 26 events. Those events organized to make money for the organizers such as the Big Valley events, Mosaic and Folkfest clearly had higher expenditures than other events. However events such as the National Figure Skating Championships and Mixed Curling also had a high expenditure impact at the events themselves.

TABLE 14.0

Expenditure by Persons Attending Events at the Events Themselves

Event Category	Average Per Person Expenditure at Event	Total Estimated Expenditure at Event
Festivals		
Big Valley Jamboree	$ 45.87	$ 2,293,363.41
Folkfest	47.86	1,196,470.55
Mosaic	34.12	852,932.64
Moose Jaw Bandfest	10.17	264,333.33
Optimist Bandfest	19.87	79,463.30
Yorkton Filmfest	18.23	1,823.29
Total	28.74	4,688,386.83
Rodeos		
Big Valley (Fall '83)	31.72	1,268,772.21
Big Valley (Spr. '84)	28.83	720,862.68
Humboldt (Indoor)	11.92	71,538.46
Regina Horse Show	27.75	277,489.21
Total	29.59	2,338,662.56
Sports		
Yorkton Hockey Tourn.	20.68	310,204.08
S. C. Hockey Tourn.	28.05	392,683.37
National Figure Skating	47.02	940,346.67
Sask. 60	14.78	13,300.00
P. A. Mixed Curling	49.73	49,728.26
Total	36.74	1,706,262.38
Themed		
Agribition	26.63	3,994,790.85
Wstrn. Farm Prog. Show	21.94	877,600.00
Hexabition	12.55	627,689.80
Moose Jaw Air Show	13.96	418,800.00
Total	19.13	5,559,895.28
Arts/Crafts		
Sundog	17.04	136,314.46
Bazart	23.59	235,860.90
Sask. Handcraft Festival	30.40	668,823.70
Total	24.63	1,040,999.06
Fairs		
Buffalo Days	26.63	6,392,339.92
Novelty (Other)		
Those Were The Days	4.23	10,993.38
Heritage Bus Tours	3.14	2,168.57
Total	4.16	13,161.95
Native		
Fort Qu'Appelle Pow-Wow	12.11	12,108.59
TOTALS	24.72	22,117,801.92

Utilizing the sample data obtained from the 26 events, Table 14 also indicates the total estimated expenditure that occurs at all the events. Expenditure at the 26 events was approximately $22 million. On average approximately $25 is the estimated per person spend at Saskatchewan events. Unfortunately, we do not know how reliable these expenditure estimates are. Most of the event organizations do not really know what the total expenditure is at their events. Often the event organizers do not receive all of the income resulting from expenditure that occurs at the site. In the case of Buffalo Days, the Regina Exhibition Association receives a percentage from some concessions. However we did discuss our estimates with some of the host organizations. Discussions with Mosaic and the Regina Exhibition Association indicated that our estimates were "in the ball park" and were reasonably reflective of the size of expenditure that does occur. In others we feel that the estimate of average spend at the event may not be accurate.

Once again Buffalo Days was the most significant provincial event with an estimated $6.4 million spend at the fair grounds. However other events such as the Big Valley Jamboree resulted in a very high expenditure impact at the location. This was due to a much higher per person expenditure through ticket purchases and expenditures on food/beverage and purchases of souvenirs at the site.

6.2 Tourism Impact

In addition to the money spent at events by both local and non-local people, expenditure is also incurred by persons travelling to the events and as a result of their stay in the host community. It is this group of people that we are most interested in in terms of their impact upon local and provincial economies. The following sections provide considerable detail from our sample of events as to the characteristics of tourism travel and expenditure generated by the events and their resulting impact on the host community.

Mode of Transport

Perhaps characteristic of Saskatchewan's tourism industry the main mode of transport was the private automobile. This is not surprising as over 70% of the tourist travel generated by events occurs from travel in Saskatchewan.

Travel Motivation

As indicated in Table 15 the events themselves were clearly the principal reason for travel motivation for 75% of the people surveyed. However at the individual event level there is considerable variation to this. Interestingly, events held at Saskatoon are an exception to this. In the cases of Folkfest (37.1%), Sundog (14.3%) and Mexabition (55.9%) visitation to the event was one of the reasons for travel. For all events visiting relatives and business were the principal secondary reasons for travel motivation. In the cases of Agribition and Mexabition business travel motivation was greater for those persons who had other reasons for travelling to the host community to attend the event.

The primary motivation for Saskatchewan tourism travel is visiting friends and relatives (VFR) with little impact on the Province's accommodation industry. The events surveyed contrast with the provincial travel profile as attendance at the event is the primary travel motivation with business travel and VFR being almost evenly ranked as secondary travel reasons.

Accommodation Impact

Table 16.0 indicates that 52.5% of the people surveyed stayed one night or more. For those persons staying one night or more the average length of stay was 3.1 nights. Sports events experienced the least amount of day trips (12.8%) and Arts/Crafts events the highest with 57.4% of the travel being generated as day trips.

TABLE 15.0

Reason for Travel Motivation

Event Category	Attending the Event %	Other Reasons for Travel %	Tourism	Visiting Relatives	Other Attractions	Business	Other
Festivals							
Big Valley Jamboree	94.2	5.8	3	2	1	3	0
Folkfest	37.1	62.9	12	30	3	2	9
Mosaic	50.0	50.0	0	1	0	1	0
Moose Jaw Bandfest	100.0	0.0	0	0	0	0	0
Optimist Bandfest	93.9	6.1	0	0	1	0	1
Yorkton Filmfest	94.4	5.6	1	0	0	0	0
Total	81.2	18.8	16	33	5	6	10
Rodeos							
Big Valley (Fall '83)	95.4	4.6	0	0	0	0	12
Big Valley (Spr. '84)	83.3	8.0	1	1	0	2	0
Humboldt (Indoor)	100.0	2.0	0	0	0	0	0
Regina Horse Show	81.5	15.0	0	0	2	3	0
Total	93.5	6.5	1	1	2	5	12
Sports							
Yorkton Hockey Tourn.	91.7	8.3	0	0	0	0	1
S. C. Hockey Tourn.	85.6	14.4	0	2	1	6	5
National Figure Skating	92.1	7.9	0	3	0	3	1
Sask. 60	88.9	11.1	0	0	0	1	0
P. A. Mixed Curling	75.9	24.1	1	1	0	5	0
Total	86.7	13.3	1	6	1	15	7
Themed							
Agribition	73.2	26.8	12	25	18	54	21
Wstrn. Farm Prog. Show	86.4	13.6	2	4	0	12	1
Mexabition	55.9	44.1	21	36	24	53	10
Moose Jaw Air Show	69.0	31.0	10	36	9	9	19
Total	69.2	30.1	45	101	51	128	51
Arts/Crafts							
Sundog	14.3	85.7	0	1	4	1	0
Bazart	70.0	30.0	1	2	1	0	0
Sask. Handcraft Festival	75.5	24.5	3	3	3	1	2
Total	68.2	31.8	4	6	8	2	2
Fairs							
Buffalo Days	61.2	38.8	5	12	4	11	4
Novelty (Other)							
Those Were The Days	11.0	22.0	12	9	9	0	1
Heritage Bus Tours	0.0	4.0	0	2	0	2	0
Total	32.6	67.4	12	11	9	2	1
Native							
Fort Qu'Appelle Pow-Wow	94.4	5.6	2	1	2	0	0
TOTALS	75.3	24.7	86	171	82	169	87

TABLE 16.0

Length of Stay and Accommodation Characteristics

Event Category	Length of Stay: Day Trip %	Length of Stay: One Night or More %	Length of Stay: Avg. Length of Stay %	Overnight Accommodation Required: Yes %	Overnight Accommodation Required: No %	Type of Accommodation Required %: Hotel/ Motel	Type of Accommodation Required %: With Frds./ Rel.	Type of Accommodation Required %: Camping	Type of Accommodation Required %: Othr.
Festivals									
Big Valley Jamboree	23.8	72.6	2.7	76.2	23.8	4.6	11.5	84.0	0.0
Folkfest	20.0	80.0	3.8	98.3	1.7	18.6	61.0	10.2	6.8
Mosaic	100.0	0.0	4.6	100.0	0.0	0.0	100.0	0.0	0.0
Moose Jaw Bandfest	41.2	58.8	3.5	64.7	35.3	81.8	18.2	0.0	0.0
Optimist Bandfest	42.4	57.6	2.8	54.6	45.5	66.7	33.3	0.0	0.0
Yorkton Filmfest	11.1	88.9	3.1	88.9	0.0	81.3	18.8	0.0	0.0
Total	25.8	74.2	3.1	78.5	21.5	21.5	27.0	49.0	1.7
Rodeos									
Big Valley (Fall '83)	44.4	55.6	3.2	37.5	62.5	5.4	10.8	88.2	0.0
Big Valley (Spr. '84)	45.8	54.2	3.5	54.2	45.8	38.5	53.9	7.7	0.0
Humboldt (Indoor)	90.9	9.1		0.0	100.0				
Regina Horse Show	33.3	66.7	4.7	66.7	33.3	55.6	38.9	5.6	0.0
Total	45.2	54.8	3.4	40.0	60.0	16.1	19.4	67.7	0.0
Sports									
Yorkton Hockey Tourn.	8.3	91.7	3.0	91.7	8.3	81.8	9.1	9.1	0.0
S. C. Hockey Tourn.	7.8	92.3	3.2	92.2	7.8	84.3	14.5	1.2	0.0
National Figure Skating	11.1	88.9	4.4	87.3	12.7	72.7	27.3	0.0	0.0
Sask. 60	55.6	44.4	1.5	44.4	55.6	50.0	50.0	0.0	0.0
P. A. Mixed Curling	20.7	79.3	4.9	79.3	20.7	87.0	13.0	0.0	0.0
Total	12.8	87.2	3.8	86.7	13.3	80.1	18.8	1.1	0.0
Themed									
Agribition	52.7	47.3	2.9	47.3	52.7	50.2	48.0	1.8	0.0
Watrn. Farm Prog. Show	57.7	42.3	2.2	44.5	55.5	42.6	39.3	18.0	0.0
Mexabition	75.9	24.4	2.5	24.1	75.9	37.7	59.7	2.6	0.0
Moose Jaw Air Show	53.2	46.8	3.1	46.8	53.2	24.8	52.5	22.8	0.0
Total	60.0	40.0	2.8	40.3	59.7	41.5	49.8	8.7	0.0
Arts/Crafts									
Sundog	57.1	42.9	3.0	42.9	57.1	0.0	100.0	0.0	0.0
Bazart	20.0	80.0	2.8	80.0	20.0	37.5	62.5	0.0	0.0
Sask. Handcraft Festival	64.7	35.3	2.4	35.3	64.7	27.8	44.4	27.8	0.0
Total	57.4	42.6	2.4	42.7	57.4	27.6	55.2	17.2	0.0
Fairs									
Buffalo Days	48.2	51.8	4.0	51.8	48.2	18.2	54.6	15.9	0.0
Novelty (Other)									
Those Were The Days	61.5	38.5	3.5	38.5	61.5	13.3	73.3	13.3	0.0
Heritage Bus Tours	0.0	100.0	3.5	100.0	0.0	75.0	25.0	0.0	0.0
Total	55.8	54.2	3.7	44.2	55.8	26.3	63.2	10.5	0.0
Native									
Fort Qu'Appelle Pow-Wow	0.0	100.0	3.0	100.0	0.0	5.0	0.0	95.0	0.0
TOTALS	47.5	52.5	3.1	51.1	48.9	38.	36.2	24.8	0.4

With an average length of stay at 3.1 nights, events are resulting in a longer length of stay than in the case of the Saskatchewan industry profile which results in 2.7 person nights for resident travel and 3.0 person nights for non-resident travel.

Regarding accommodation over 51.1% of the visitors to these events required some form of accommodation. Again, sports events had the highest accommodation requirement and arts/crafts the lowest. As to the type of accommodation required, Table 16 indicates that it is fairly evenly distributed between hotels/motels (38.3%), staying with friends/relatives (36.2%) and camping (24.8%). Sports events had the greatest impact on hotel/motel accommodation. Some possible reasons for this would be the time of year that the event is held and the nature of the events themselves which would rule out staying with friends/relatives or camping. Once again compared to the Saskatchewan industry travel profile, events provide a positive contrast. As indicated in the previous section, one of the key structural problems with Saskatchewan tourism travel is that it is highly motivated by visiting friends and relatives which has little impact on the province's accommodation industry. In the case of events, over half the visitors required accommodation and the principal form of accommodation was in the form of hotels and motels.

Tourism Travel Expenditures

One of the key objectives for this study was to determine the tourism expenditure impact resulting from Saskatchewan events. Although events were thought to be travel motivators resulting in positive tourism expenditure impact for Saskatchewan communities, there was no statistical or factual evidence to support this. Further, little information existed as to what kinds of events had the greatest impact on local communities. As a result, without this information, comprehensive support for the development of Saskatchewan events has not occurred.

Table 17.0 presents data related only to expenditure associated with travel by persons attending the 26 events surveyed of 50

TABLE 17.0

Tourism Expenditure Impact Resulting from Events

Event Category	Estimated Attendance At Event	% That Are Tourists	Average Per Person Travel Expenditure	Total Travel Expenditure	Avg. Per Tourist Expenditure at Event	Total Tourism Expenditure at Event	Avg. Per Tourist Expenditure	Total Tourism Expenditure
Festivals								
Big Valley Jamboree	50,000	63.3	86.11	$ 2,725,282.44	$ 45.87	$1,451,699.05	$131.98	$ 4,176,981.49
Folkfest	25,000	18.3	183.19	838,056.82	47.86	218,954.13	231.05	1,057,011.95
Mosaic	25,000	4.8	168.75	202,500.00	34.12	40,940.77	202.87	243,440.77
Moose Jaw Bandfest	26,000	15.2	283.00	1,118,416.00	10.17	40,178.67	293.17	1,158,594.67
Optimist Bandfest	4,000	50.0	68.65	137,307.69	19.87	39,731.65	88.52	177,039.39
Yorkton Filmfest	100	66.7	202.49	13,506.75	18.23	1,216.13	220.72	14,722.88
Total	130,100	35.9	114.43	5,035,069.70	28.74	168,313.36	143.17	5,203,383.06
Rodeos								
Big Valley (Fall '83)	40,000	50.4	76.17	1,535,672.73	31.72	639,461.44	107.89	2,175,134.17
Big Valley (Spr. '84)	25,000	32.8	107.50	881,500.00	28.82	236,442.95	136.23	1,117,943.96
Humboldt (Indoor)	6,000	27.3	17.50	28,665.00	11.92	19,530.00	29.42	48,195.00
Regina Horse Show	10,000	42.0	320.23	1,345,000.00	27.75	116,545.47	347.98	1,461,545.47
Total	81,000	45.3	110.86	3,790,837.73	29.59	1,059,414.23	140.45	4,850,251.96
Sports								
Yorkton Hockey Tourn.	15,000	23.8	267.92	956,462.50	20.68	73,828.57	288.60	1,030,291.10
S. C. Hockey Tourn.	14,000	62.2	273.96	2,385,629.17	28.05	244,240.06	302.01	2,629,878.23
National Figure Skating	20,000	55.3	350.23	3,873,425.44	47.02	520,011.71	397.25	4,393,437.15
Sask. 60	900	40.0	42.50	15,300.00	14.78	5,320.00	57.28	20,620.00
P. A. Mixed Curling	1,000	25.0	518.48	129,619.57	49.73	12,432.07	568.21	142,051.64
Total	50,900	46.5	307.35	7,360,436.67	36.74	793,412.00	344.09	8,153,848.67
Themed								
Agribition	150,000	63.4	180.42	17,157,625.00	26.63	2,532,697.43	207.05	19,690,322.43
Wstrn. Farm Prog. Show	40,000	79.5	117.58	3,739,150.00	21.94	697,692.00	139.52	4,436,842.00
Hexabition	50,000	42.9	100.86	2,163,572.56	12.55	269,278.92	114.82	2,432,851.48
Moose Jaw Air Show	30,000	44.8	92.29	1,240,460.87	13.96	187,622.40	106.25	1,428,083.27
Total	270,000	54.3	150.19	24,300,808.43	19.13	3,019,023.15	169.32	27,319,831.58
Arts/Crafts								
Sundog	8,000	10.0	65.50	52,400.00	17.04	13,631.45	82.54	66,031.45
Bezart	10,000	16.7	240.94	402,363.63	23.59	39,388.77	264.53	441,754.40
Sask. Handcraft Festival	22,000	70.0	66.22	1,019,822.22	30.40	468,176.59	96.62	1,487,998.81
Total	40,000	35.8	82.52	1,474,587.85	24.63	372,677.64	106.15	1,847,265.68
Fairs								
Buffalo Days	240,000	30.5	209.50	15,336,000.00	26.63	1,949,663.68	236.13	17,285,663.68
Novelty (Other)								
Those Were The Days	2,600	46.4	59.70	72,018.42	4.23	5,100.93	63.93	77,119.35
Heritage Bus Tours	690	57.2	490.63	193,639.88	3.14	1,240.42	493.77	194,880.30
Total	3,290	47.4	165.93	265,658.30	4.16	6,238.76	170.09	271,897.06
Native								
Fort Qu'Appelle Pow-Wow	1,000	76.0	176.30	134,000.00	12.11	9,202.53	188.41	143,202.53
TOTALS	816,290	46.9	151.15	57,964,191.87	24.72	10,369,966.43	175.87	68,234,158.20

miles or greater. From the sample data obtained from the survey, we have calculated the full expenditure impact resulting from the estimated attendance at the 26 events. As indicated in Table 17.0 the resulting travel expenditure impact from the 26 events is $57.9 million. In the last column in Table 17.0 we have added expenditure at the events themselves to the travel expenditure incurred to determine total tourism expenditure. The resulting total tourism expenditure is $68.2 million.

We have purposely separated the expenditure tourists incur at the events themselves from travel expenditures in the community and area. Both expenditures are the result of tourism travel. However it is important to note what events do for the host community -- for every $24.72 tourists spend at the events themselves, they spend $151.15 in the community. In other words the community captures up to 6 times the expenditure from tourists than do the events themselves. This presents a compelling argument for host communities to assist events organizers with the development of their events.

Sporting events emerged as having the highest average trip expenditure at $320.09. Trip expenditure of $518.48 associated with travel to Prince Albert's Mixed Curling Finals was the highest of any event. However the total expenditure impact for the event results from a number of factors such as total attendance, number of tourists attending the event, as well as the number of tourists attending the event who actually incur expenditure and the amount of that expenditure.

At $19.7 million in travel expenditure, Agribition resulted in the largest tourism expenditure impact of any of the 25 events surveyed. Second to this was the City of Regina's Buffalo Days at $17.3 million. These two events alone accounted for 54.3% of the total expenditure calculated for all 26 events. None of the expenditure resulting from the other 24 individual events exceeded $5.0 million.

Only 6 events, in addition to Agribition and Buffalo Days, exceeded $2.0 million in tourism expenditure:

	Attendance	Average Tourist Spend	Total Tourism Expenditure
National Figure Skating Finals	20,000	$397.25	$4,393,437
Western Farm Progress Show	40,000	139.52	4,436,842
Big Valley Jamboree	50,000	131.98	4,176,982
Swift Current Hockey Tourn.	14,000	302.01	2,629,878
Mexabition	50,000	114.82	2,432,852
Big Valley (Fall '83)	40,000	107.89	2,175,134

The National Figure Skating Finals held in the City of Regina was the fourth most significant event in terms of expenditure impact of the 26 events surveyed. Although total attendance was lower than a number of the other events surveyed the tourism spend was one of the highest. This is also true of the Swift Current Hockey Tournament. Although events such as Saskatoon's Mexabition and the Big Valley Jamboree had 3.5 times the total attendance they produced the same relative level of total tourism expenditure.

Total Community Economic Impact

The previous section dealt only with the expenditure impact resulting from tourism travel of greater than 50 miles. However there is also an additional expenditure impact on host communities associated with persons travelling less than 50 miles to the event. This travel, although not considered tourism travel, does have an expenditure impact associated with it. As a result, in

order to determine the full expenditure impact of events on local communities, all non-local expenditure has to be considered. The local store owner is less concerned with the origin of travellers. Whether the person is from out of province or 25 miles outside the community, expenditure made in local stores or business resulting from travel to the event is of primary importance to local merchants and their support of the event. Table 18 indicates that the full community economic impact resulting from all non-local persons attending the 26 events, as well as expenditure by persons at the events themselves, is $93,901,400. Here we see that tourism travel expenditure (50 miles or greater) does account for the largest portion of the economic expenditure impact on the community.

The following table indicates the distribution of the total community expenditure impact resulting from events by expenditure category. Here we see that eating (29.2%) and shopping (25.8%) are the principal forms of impact accounting for 55% of all expenditure made in the host community.

TABLE 18.0

Distribution of Community Expenditure by Non-Locals

	Distribution of Community Expenditure Impact	
Expenditure Category	%	$ Expenditure
. Eating	29.2	$20,929,270
. Shopping	25.8	18,541,190
. Accommodation	15.3	10,957,392
. Transportation	13.9	9,982,743
. Entertainment	10.2	7,308,498
. Business Expenditure	4.5	3,265,445
. Souvenirs	2.8	2,020,570
Total	101.7	$73,005,108

* Note: Rounding errors in the expenditure categories result in a total calculation error of 1.7%, (i.e. Table 18 indicates total community expenditure of $71,790,600 as opposed to $73,005,108 as indicated above).

TABLE 19.0

Total Community Economic Impact and Its Distribution That Results from the 26 Events Surveyed (000's)

Event Category	Tourism Travel Expenditure (50 miles +) $	Regional Expenditure (under 50 mi.) $	Expenditure by Persons at the Events	Total Community Economic Impact
Festivals				
Big Valley Jamboree	2,725.3	640.4	2,293.4	5,659.1
Folkfest	838.1	114.7	1,196.5	2,149.3
Mosaic	202.5	0.0	852.9	1,055.4
Moose Jaw Bandfest	1,118.4	1,420.2	264.3	2,802.9
Optimist Bandfest	137.3	27.1	79.5	243.9
Yorkton Filmfest	13.5	0.0	1.8	15.3
Total	5,035.1	2,202.3	4,688.4	11,925.8
Rodeos				
Big Valley (Fall '83)	1,535.7	668.0	1,268.8	3,472.5
Big Valley (Spr. '84)	881.5	380.5	720.9	1,982.9
Humboldt (Indoor)	28.7	59.8	71.5	160.0
Regina Horse Show	1,345.0	58.0	277.5	1,680.5
Total	3,790.8	1,166.5	2,338.7	7,296.0
Sports				
Yorkton Hockey Tourn.	956.5	0.0	310.2	1,266.7
S. C. Hockey Tourn.	2,385.6	0.0	392.7	1,349.2
Ntl. Figure Skating	3,873.4	17.6	940.3	3,325.9
Sask. 60	15.3	1.8	13.3	3,891.0
P. A. Mixed Curling	129.6	.4	49.7	66.8
Total	7,360.4	18.4	1,706.3	9,085.1
Themed				
Agribition	17,157.6	1,937.2	3,994.8	23,089.6
Watrn. Farm Prog. Show	3,739.2	247.6	877.6	4,864.4
Hamsbition	2,163.6	1,067.8	627.7	3,859.1
Moose Jaw Air Show	1,240.5	156.5	418.8	1,815.8
Total	24,300.8	3,409.2	5,559.9	33,269.9
Arts/Crafts				
Sundog	52.4	0.0	136.3	188.7
Bezart	402.4	57.9	235.9	696.2
Sask. Handcrft. Fest.	1,019.8	.9	668.8	1,689.5
Total	1,474.6	58.8	1,041.0	2,061.7
Fairs				
Buffalo Days	15,336.0	7,216.0	6,392.3	28,943.3
Novelty (Other)				
Those Were The Days	72.0	3.4	11.0	86.4
Heritage Bus Tours	193.6	0.0	2.2	195.8
Total	265.7	3.0	13.2	281.9
Native				
Ft. Qu'Appelle Pow-Wow	134.0	20.0	12.1	166.1
TOTALS	57,864.2	13,926.4	22,110.8	93,901.4

6.3 Economic Impact - Conclusions

In this section we have drawn together the key findings of our survey in the form of a conclusive statement(s) regarding the economic significance of events to Saskatchewan Tourism and to the Saskatchewan Economy.

Saskatchewan Tourism

Table 19 provides a comparative analysis between the tourism market and expenditure characteristics associated with the 26 events and Saskatchewan's existing tourism industry. The 26 events surveyed exhibit the same characteristic tendency of Saskatchewan tourism in general and that is a strong reliance on the resident (Saskatchewan) travel market. However events are slightly less reliant on this market (73.9%) as in the case of the province's industry (76.8%). With the exception of the U.S. travel market the events had greater travel visitation from other Canadian provinces and from the international market.

The most significant difference between eve ts and Saskatchewan tourism is the per person trip expenditure. The per person trip expenditure of $175.87 resulting from travel to the events is higher than the per trip expenditure associated with Saskatchewan Travel ($103.90).

The tourism expenditure associated with the 26 events surveyed would have accounted for 6.8% of Saskatchewan's total tourism expenditure and 4.8% of total tourism travel in Saskatchewan. Although our sample represents roughly half of the total attendance at all Saskatchewan events it includes most of the major events held in Saskatchewan which have significant tourism travel

associated with them. It does not include many of the Province's smaller events that are purely of local and regional significance and not likely to have much in the way of tourism travel associated with them. Without a registry of Saskatchewan events, it is impossible to have a complete inventory of events held annually or otherwise. Although our sample does contain a number of the Province's larger events, we still feel it is reasonably reflective of all events held in Saskatchewan. A small event can conceivably attract the same percentage of tourists as do large events. In some cases large events such as Mosaic and Folkfest have attracted few tourists.

TABLE 20.0

Comparison Between Saskatchewan and Surveyed Events' Tourism Markets and Expenditures Impact

	Tourism Travel Characteristics	
	Saskatchewan	Events Sample
. Origin of Tourism Visitation		
Saskatcheawn Residents	76.8%	73.9%
Canadians	16.8%	21.7%
U.S.A.	6.0%	3.0%
International	.4%	1.5%
. Per Person Trip Expenditure	$103.90	$175.87
. Trip Generation	8 M	0.38 M
. Total Tourism Expenditure	$ 1 B	$68.2 M
. Estimated Direct Employment	27,000	1,845

Given this, we feel that our sample is representative of the total tourism expenditure impact that all Saskatchewan events have on the Province's tourism economy. The total attendance identified for all Saskatchewan events is estimated to be 1.7 million people. This figure includes the attendance at 7 events contained within our sample but not within the provincial calendar of events. If we assume that of this total attendance, 46.9% of the people are tourists and on average their per person expenditure is $175.87, then the total tourism impact associated with all Saskatchewan events is $140.2 million or 14% of total tourism expenditure in Saskatchewan.

Lastly, as indicated in Table 19, we have also determined the direct employment impact resulting from the 26 events. The employment estimates were derived from applying an estimated employment ratio of 33.8 person years of direct employment resulting from 1.25 million in tourism expenditure.* A total of 1,845 jobs were created as a result of the tourism expenditure created by the 26 events. Again, assuming that the 26 events are representative of all events in Saskatchewan, the total employment impact from all events would be 3,791 or 14.0% of Saskatchewan's total tourism employment.

Given the data and information developed, Saskatchewan's events are making a significant contribution to Saskatchewan tourism. Most importantly they positively impact on a structural problem in the Saskatchewan industry, which is the low trip expenditure resulting from Saskatchewan travel markets. Trip expenditure in Saskatchewan is the lowest in Western Canada and 25% lower than the average for Canadian trip expenditure.

Community and Provincial Economic Impact

If we were to consider Saskatchewan's events as a single tourism industry or business, their sales would be significant. It was indicated that tourism expenditure associated with all Saskatchewan events would be $140.2 million.

---

* Source: Saskatchewan Tourism Strategy, prepared for the Government of Saskatchewan and Canada by Derek Murray Consulting Associates, Marshall Macklin Monaghan and Thorne Stevenson Kellogg.

To illustrate the significance of this level of expenditure we have compared Saskatchewan events, as an industry, with annual sales of $140 million with other Saskatchewan-based industries and businesses. Table 21 ranks the top 25 Saskatchewan-based companies on the basis of sales. Using the single industry analogy events would be ranked 12th on the basis of sales. Lastly, for the Saskatchewan Government, roughly 3¢ is generated to the Provincial Government Treasury for every one dollar of expenditure in Saskatchewan. As a result $4.2 million in revenue would have been generated in provincial government revenue. The full impact of revenue generated for all three levels of events is very significant. Previous studies have shown that up to 33¢ is generated directly and indirectly for all levels of government from every dollar of expenditure.

Regarding the economic impact on local communities, the City of Regina, clearly emerges as being the most successful community in Saskatchewan in regard to the development of events and their economic impact on the community. As indicated in Chapter 3.0 the estimated annual attendance at Regina's events was approximately 600,000 people or 35% of the entire attendance for all of Saskatchewan's events. Table 22.0 indicates the economic significance of events to the City of Regina.

In addition to demonstrating that Regina's events result in 62.1 million dollars for the Regina economy, the table also indicates that for every one dollar events organizers receive, the Regina economy receives 4.7 dollars. This is a clear demonstration of why the City of Regina should be supporting events that have tourism potential.

TABLE 21.0

Sales Comparison: Saskatchewan Events and Saskatchewan for Provincially-Based Companies

# Rank	Company	Sales Volume	Total Employees	Sask.-Based
1.	Saskatchewan Wheat Pool, Regina	$ 2,273,778,000	3,977	2,836
2.	Federated Co-operatives Ltd., Saskatoon	1,375,000,000	1,950	745
3.	Saskatchewan Power Corporation, Regina	634,040,000	3,321	all
4.	Saskatchewan Telecommunications, Regina	326,100,000	4,400	all
5.	Saskatchewan Government Insurance	290,056,526	1,273	all
6.	Interprovincial Co-operative, Saskatoon	216,000,000	50	46
7.	Potash Corporation of Saskatchewan, Saskatoon	215,737,000	1,826	1,805
8.	IPSCO Inc., Regina	192,000,000	1,611	1,005
9.	International Mineral & Chemical Corp., Esterhazy	191,526,000	1,200	1,000
10.	CSP Foods Ltd., Saskatoon	180,000,000	650	344
11.	Prince Albert Pulp Company Ltd., Prince Albert	150,000,000	1,000	995
12.	SASKATCHEWAN EVENTS	140,000,000	3,786	3,786
13.	Dairy Producers Co-operative Ltd., Regina	137,700,000	700	700
14.	Sask. Oil and Gas Corporation, Regina	136,047,000	250	250
15.	Agra Industries Limited, Saskatoon	132,000,000	2,500	250
16.	Army & Navy Department Store, Regina	100,000,000	1,300	450
17.	Credit Union Central, Regina	93,113,000	200	220
18.	Co-operators Life Insurance Co., Regina	91,922,000	184	153
19.	Cairns Homes Limited, Regina	82,319,000	200	200
20.	Co-operative Trust Company of Canada, Saskatoon	81,387,000	242	146
21.	Many Islands Pipelines (Cda.) Regina (SPC Subsidiary)	70,860,000	18	9
22.	McCallum Hill Ltd., Regina	N/A	250	235
23.	Amok Ltd., Saskatoon	54,017,000	320	320
24.	Saskatoon Co-operative Association, Saskatoon	53,500,000	345	345
25.	Pioneer Co-operative Association Ltd., Swift Current	50,642,306	350	350

TABLE 22.0

Economic Significance of City of Regina's Events

Sampled Events	Estimated Attendance	Value of Expenditure to Events ($ 000's) *	Value of Expenditure to the Local Regina Economy**
Buffalo Days	240,000	6,392.3	28,943.3
Agribition	150,000	3,994.8	23,089.6
Western Farm Progress Show	40,000	877.6	4,864.4
Mosaic	25,000	852.9	1,055.4
National Figure Skating Championships	20,000	940.3	3,325.9
Regina Horse Show	10,000	277.5	1,680.5
Bazart	10,000	235.9	696.2
Optimist Band Festival	4,000	79.5	243.9
Total	499,000	13,650.8	63,899.2
All City of Regina Events	600,000	16,387.5	76,709.7

* From Table 14.0.
** From Table 18.0

Obviously events are very significant to the City of Regina's economy. However the question emerges as to why Regina has been so successful in the development of its events whereas other communities such as Saskatoon have not. Part of the reason for Regina's success is the Regina Exhibition Association which is now in its 100th year of hosting and developing exhibitions. Regina's most significant events (Buffalo Days, Agribition and Western Farm Progress Show) account for an annual attendance of 430,000 or 72% of the total attendance at all the City's events. All three events are held at the Association's exhibition grounds. Facility improvements over the last ten years, such as the new Agridome, have allowed for both upgrading and capacity expansion. The recent construction of new facilities will allow for expansion and improvements to Agribition. These expansions were assisted by capital grants from the federal government. The Exhibition Association also has a longer term development plan for the grounds to guide further facility improvements.

There are a number of reasons for Regina's success in events' development. At the centre of this success has been the Regina Exhibition Association and its management and organizational capability in hosting, developing and marketing events. This has been accompanied by continuous facility improvements to facilitate further development and expansion of the events. Lastly, the organizational success of the Regina Exhibition Association also spills over into other events held in the City of Regina. Directors of the Association are also involved in the organization of City events such as the Saskatchewan Roughriders and other community sporting events.

7.0 CONCLUSIONS AND RECOMMENDATIONS

7.1 Conclusions

One of the principal motivations for undertaking this study was to determine what impact Saskatchewan's events have in stimulating tourism, travel and the resulting expenditure benefits for Saskatchewan communities. This study was one of four major study initiatives to determine the most effective manner to develop Saskatchewan's Tourism industry. The resulting direction from these study initiatives would then form the basis for implementation of a Saskatchewan Tourism Strategy.

The events study and its findings must then be considered in the context of what role events could play in a Tourism Strategy for the Province of Saskatchewan. In the development of Saskatchewan's tourism strategy, some fundamental weaknesses in problems were identified:

- **Low Trip Expenditure**

  Although travel volume through and in Saskatchewan is relatively high when compared to other provinces, actual trip expenditure is low. The contributing factors to this are a high volume of pass-through travel and a significant portion of travellers visiting and staying with friends and relatives.

- **A Poor Market Image for Both Pleasure and Business Travel**

  Both residents and non-residents do not perceive Saskatchewan to provide high quality leisure products. It is characterized as uninteresting and dull.

- **Saskatchewan is Highly Dependent Upon its Own Resident Market**

  In comparison to other provinces Saskatchewan has one of the highest dependencies upon its own residents to generate tourism travel receipts.

- **Saskatchewan Has One of the Highest Travel Deficits in Canada**

  Saskatchewan people clearly like to travel both in and outside their province. Unfortunately travel expenditure in the province is not matched by travel expenditure outside the province. Saskatchewan residents tend to travel outside their province for both business and pleasure experiences which contributes to a high travel deficit.

- **Existing Tourism Resources Have Not Been Adequately Developed or Promoted**

  Saskatchewan does possess attractions and resources of potentially sufficient quality to function as tourism attractors. However to a large extent these resources are either underdeveloped and/or not adequately marketed for optimal tourism impact. This may be part of a broader syndrome impacting on the industry and that is a general lack of tourism awareness on the part of both the Saskatchewan industry and public.

- **Saskatchewan Tourism Industry has Traditionally Lacked Government Support**

  Saskatchewan's economy is resource-based. As a result economic policy and development initiatives have largely been directed at the province's principal resources. The province's tourism

industry has received little attention as part of the Province's economic strategy. Consequently, there has been only modest program support for tourism industry development in Saskatchewan. Both Alberta and Manitoba have placed greater emphasis, than in Saskatchewan's case, on the development of their respective tourism industries.

Given the above weaknesses three principal objectives were identified for Saskatchewan's tourism industry:

1. Increase the level of trip expenditure made in Saskatchewan.

2. Increase Saskatchewan's share of non-residential travel.

3. Improve Saskatchewan's image as a destination for business and pleasure travel.

In realizing these objectives the strategy focuses on Saskatchewan tourism industry product development through the growth and development of key attractions or travel motivators, increased program development to enhance a more positive travel image and industry impact to ensure an integrated, coordinated approach to tourism development at the community, regional and provincial levels.

In a province that does not have an abundance of outstanding natural attractions compared to other competing destination areas, it must maximize the development of those attractions where the Province can effectively compete. Clearly, as the past 6 chapters have demonstrated, events are definitely one of Saskatchewan's principal tourism products or attractions around which the three objectives of the Tourism Strategy can focus on through product and program development.

Events are also an area where Saskatchewan can successfully compete with other provinces in tourism travel markets. One of Saskatchewan's greatest assets is community organization -- the ability to organize and host major or international events such as the Silver Broom. Within the Canadian Football League Saskatchewan has the best reputation to organize and market a professional football product. Agribition is also another example of organizational and development skills that has seen the development of one of North America's premier livestock shows.

The development of Saskatchewan events would have a positive impact on the weaknesses identified in Saskatchewan's current industry structure. Clearly they address the problem of low trip expenditure with an average trip expenditure of $175.87 for events surveyed compared to the Saskatchewan trip expenditure average of $103.90. Although events achieve only marginally better penetration in non-resident markets, there has been little out-of-province marketing of Saskatchewan events. Unlike the current Saskatchewan industry where travel motivation is characterized by visiting friends and relatives, with a significant component of pass-through travel, events themselves were shown to be the principal travel motivation in 75% of the travel generated. As a result events clearly have the potential to induce destination motivated travel to Saskatchewan.

With further development of both the events themselves as well as coordinated programming support to link events with other attractions, they offer significant potential to enhance Saskatchewan's destination image resulting in extended trips and greater tourism expenditure in Saskatchewan.

7.2 Recommendations

As indicated in the previous section Saskatchewan events should play an important role in the Province's tourism strategy. We recommend that they be a separate program element within that strategy. As to the level of support to be provided to the development of events, previousiy we had indicated that the annual revenue to the Provincial Government from events was estimated to be in excess of $4 million. Clearly, the Province could afford to redirect some of that revenue base towards events and their

further development. It would also be a good investment in the government's future income stream from events.

A program budget of $2 million would be a reasonable level of program support to be contained within a federal-provincial tourism sub-agreement to develop and market Saskatchewan events in pursuit of the Tourism Strategy's objectives. This level of program support would give the Strategy an almost immediate lift-off. Events are now in place whereas other tourism investments necessary to improve Saskatchewan attractions and tourism plant may require a considerably longer time frame to develop and implement specific investment proposals.

As to the type of support given it should be in the form of marketing and development assistance. It should only be for market development beyond 50 miles of the event's location. Assistance should provide for the development and implementation of marketing plans. Assistance could also come in the form of salary support for marketing directors or personnel necessary to further develop and promote the event. Consideration might also be given to "hosting grants" to be shared with the host municipalities in assisting the event's organization and management. This kind of grant may assist municipalities and organizations in attracting conventions or sporting events to their communities. Assistance could also be provided for market identification. For example, if the Moose Jaw Air Show expressed interest in developing a Commercial Air Show component for light aircraft, assistance would be provided to identify that market and the feasibility of the air show's expansion.

Lastly, as indicated from our surveys, in the case of certain events, a clear need was expressed for facility improvements. This would require capital assistance. This kind of assistance such as capital expansion required at the Regina Exhibition Grounds could be provided under a separate facilities program.

Strategic Direction

Having determined the relative importance of events to Saskatchewan tourism and that they should receive program support within a Saskatchewan Tourism Strategy, what should Saskatchewan hope to accomplish strategically with the development of events in the next five years? Where are the province's best opportunities for the development of events, what kinds of events should be developed and how does Saskatchewan obtain greater tourism market impact from events?

A strategic direction for Saskatchewan events should have two perspectives -- a provincial and a local direction.

Provincial Direction

Provincially events should play an important role in a Saskatchewan Strategy. We know that events impact positively on one of the objectives for a Provincial Strategy which is incrasing the level of trip expenditure. Our best events must undergo further market development and product improvement to impact on out-of-province markets. They must also have supporting facility development in order to facilitate greater visitor attendance. Almost 50% of persons attending Saskatchewan events indicated

improvements were necessary. This is occurring with some of Saskatchewan's larger or more successful events such as those sponsored by Bosco Homes, the Western Farm Progress Show and Agribition. As a result market promotion will have to be matched by facility and community improvements to successfully boost greater tourism visitation.

Table 23.0 indicates the estimated market size of present Saskatchewan travel markets for selected events taken from a recent market survey of Manitoba, Alberta and British Columbia. Only in the area of sporting events is Saskatchewan having some market impact. The high market penetration for festivals (30%) in the case of British Columbia is an anomaly largely based on the relatively small travel market Saskatchewan captures from British Columbia.

The same study also indicates that in the Western Canadian travel market Saskatchewan's events are rated the same or worse than events found in other provinces. No event category was rated to be better than those found in other travel destinations. As a result further product development and marketing are needed. This may not necessarily apply to themed events such as Agribition and the Western Farm Progress Show. Regarding the strategic direction or priorization for which events or event themes Saskatchewan should pursue aggressively, we would recommend the following directions:

Festivals

In the area of music festivals we would recommend the development of the Big Valley Jamboree concept. The emerging theme would be to make Saskatchewan the home of country music and the development

TABLE 23.0

Saskatchewan Out-of-Province Market for Selected Event Categories

and Market Pentration Rates

	% of Persons Interested in Activity for Pleasure Travel			Annual Size of 1984 Market Available to Saskatchewan (000's person trips)			% of Existing Travel Market Captured by Saskatchewan		
	Man.	Alta.	B.C.	Man.	Alta.	B.C.	Man.	Alta.	B.C.
Festivals	66%	65%	65%	194	345	85	10%	9%	30%
Sporting Events	57%	57%	49%	168	302	64	21%	14%	4%
Musical Events	53%	52%	56%	156	275	73	11%	6%	4%
Craft/Art Fairs	42%	42%	51%	123	223	66	2%	2%	10%

Source: . Travel Markets for Saskatchewan's Tourism Industry: Alberta, Manitoba and British Columbia.
. Derek Murray Consulting Associates, 1984.

of a country music festival concept. There is an enormous country music market and the Big Valley Jamboree is a good illustration of the level of market impact such a festival can have on both resident and non-resident markets. The event can always remain current by virtue of the performers it attracts.

One of the greatest gaps in existing Saskatchewan events is a Native festival event. An event such as the World Assembly of First Nations can draw national attention. The development, for example, of an international Pow-Wow could attract Plains Indians throughout the centre of North America and be a distinctive event with considerable tourism impact.

Unfortunately, the two largest cultural events held in Saskatchewan, Mosaic and Folkfest, currently do not have much tourism impact. They both have reached capacity in terms of facilities to handle further visitation. Further, although the cultural organizations themselves benefit finanically from the events themselves, many local businesses feel that they do not. If cultural festivals are to have greater tourism impact different approaches will have to be explored. The timing of events such as the case of Regina's Mosaic is really in the shoulder tourism season (May - early August).

Rodeos

Saskatchewan has really only two major rodeos, the Agribition Rodeo and the Big Valley Rodeo. There is a definite level of visitation rodeos can expect to attract on a stand alone basis. The Agribition Rodeo is in part supported by Agribition. The Big Valley Rodeo must be extended by some other theme or attraction. For example combining the rodeos with the Western Farm Progress Show and a music festival or jamboree would provide for greater diversity and much more significant market impact.

Sports Events

A strategy for Saskatchewan should be to make the province the amateur sporting centre of Canada. Saskatchewan has an extensive sports network supported by such organizations as Sask. Sport. Saskatchewan communities, both large and small, have shown that they can successfully organize and host national and international sporting events. This strategy should focus on winter-based sports for two reasons: it is the low tourist season and, secondly, from our survey, the expenditure impact from winter sports events is very high. Saskatchewan communities, with some exceptions, have not really developed winter festivals. These could be developed and themed around sporting events.

Saskatchewan can also host professional sporting events which tend to get lost in other larger centres which have a significant variety of nationally televised professional sports events. For example, the Silver Broom does not have to compete for attention in Saskatchwan and virtually the entire city of Regina services publicizes and hosts the event. Similarly Regina also received national praise for its hosting of the National Figure Skating Finals in 1984.

Themed Events

Saskatchewan has enjoyed some of its best success with events in this category. However they are largely concentrated in the City of Regina. The City of Saskatoon, with the possible exception of Mexabition, has not really developed any major events, themed or otherwise. The development of such events in that community would be essential if the community were to successfully develop and operate a facility to accommodate an NHL franchise. The development of themed events such as Agribition and their accompanying facility and program development is a successful and competitive alternative to other Western Canadian Convention Centres. These events require continued support to ensure their competitive position. The Western Farm Progress Show has the potential to be a much larger show.

The Moose Jaw Air Show/Fair at one time attracted upwards of 100,000 visitors. It could be developed as a major event by examining new concept development such as a Commercial Air Show component.

Arts/Crafts Fairs

Saskatchewan has really only one major event and that is the Saskatchewan Handcraft Sale at Battleford. A concept to be developed is that of a cultural and crafts industry which provides both a tourism attraction and a market for Saskatchewan hand crafted goods that are expressive of Saskatchewan culture and people.

During our field consultations an innovative idea was suggested for the development of a cultural/craft mall as a showcase of Saskatchewan culture and crafts. For example, the City of Regina's Midtown Centre could be developed into such a facility.

Regarding fairs, Saskatchewan does not have a Provincial Fair as in the case of state fairs in the U.S. One provincial concept would be the promotion of a Provincial Homecoming Festival or Fair. One of Saskatchewan's largest travel markets is people visiting friends and relatives who once lived here. The homecoming fair concept could promote various events and attractions throughout Saskatchewan during the peak travel season.

Local Direction

In order for a strategy aimed at events to be successful it has to rely on local organization and implementation. Saskatchewan will have to develop more effective local tourism organizations in support of the events themselves and to bring about much greater integration of events and their linkage to other local and area attractions.

Saskatchewan's events, at both the community and provincial level have not really been perceived as tourism attractors. The reasons for developing and organizing events by the organizers themselves are often not to promote tourism but rather to further the aims and objectives of the organization whether they be cultural or commercial. Their principal concerns are the organization and successful operation of the event itself. Tourism impact is really a secondary consideration.

Support for Saskatchewan events from a Federal/Provincial Tourism Sub Agreement should only be directed at obtaining greater tourism impact from further promotion and development of events. The further development of events can accomplish the goals of both the events organizers themselves and those of a tourism strategy. Most successful events go through various growth and development phases evolving from local events to events of national interest.

Support for the further development of Saskatchewan events, if it is to be effective in accomplishing the goal of greater tourism impact, must be twofold -- support to the event itself to improve and market the product and secondly to the community to integrate and coordinate the event within a community tourism development strategy. In relationship to the development of events, local tourism organizations should be strengthened to ensure the following:

. The planning and development of events within a community tourism strategy

  At present Saskatchewan's largest communities do not have tourism development strategies that would priorize and guide the development of the local industry, its events and attractions. All too often local industry organization is fragmented with no overall coordination between facilities such as hotels/

restaurants, commercial shopping areas, attractions and the events themselves. There are no commonly agreed to strategies for events and the local tourism industry. The development of actual tourism facilities themselves have not proceeded in a planned and integrated manner. The outcome of this lack of planning results in a lack of concentration on tourism facilities and attractions -- convention facilities not integrated with hotel facilities -- tourism attractions that are underdeveloped and lacking a critical mass.

- The timing of events to ensure that they do not conflict with one another and compete for the same market.

  As an example, in the spring of 1984, both the Bosco Home's rodeo and Mosaic were run at the same time. Neither event is really complementary to the other and they should have been run at separate times. Multi-event programming at one time is possible and desirable if the themes are complementary such as Bosco Home's Rodeo and the Western Farm Progress Show. There should also be inter-municipal coordination in the timing of events such as Moose Jaw's and Regina's events.

- The development of programmed themes for events to integrate the event with the community and the tourism attractions.

  As an example of this the Calgary Stampede is integrated into the entire community during stampede week and the city, its entertainment and attractions, take on an almost festival air. People go "stampeding" in local bars and restaurants. The development of a country music festival could also be themed in the same manner. In Saskatchewan all too often only the event is promoted and not its integration with the rest of the community.

. The planning and coordination of events to ensure greater year round facility utilization.

Events can play an important role in dealing with the seasonal nature of the tourism and travel industry. Community facilities and tourism attractions should participate in the planning and timing of events to smooth out the peaks and valleys and distribution of tourism travel over the entire operating season. This could be done through the development and planning of winter, spring, fall and summer programs for events.

APPENDIX

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: (BRIDGE CITY) SASKATOON																	
Winterfest	Saskatoon	3	Jan.	*												*	10,000
Vesna Cultural Festival	Saskatoon	3	May	*											*		10,000
Folkfest	Saskatoon	3	Aug.	*											*		25,000
Artisan	Saskatoon	1	May		*									*			—
Woodcrafters Show/Sale	Saskatoon	7	May		*									*			10,000
Artisan	Saskatoon	2	Nov.		*										*		—
Sundog	Saskatoon	2	Nov.		*										*		8,000
Pioneer/Louis Riel Days	Saskatoon	6	Jul.				*								*		40,000
Rodeo	Saskatoon	4	Apr.					*							*		7,000
Harness Racing	Saskatoon	11	May					*							*		14,000
Thorough Bred Racing	Saskatoon	85	Jul-Oct.					*							*		112,000
Downhill Ski Meet	Saskatoon	2	Jan.						*						*		50
Downhill Ski Meet	Saskatoon	2	Feb.						*						*		50
Alpine Comp. (Ski)	Saskatoon	2	Feb.						*					*			175
Downhill Ski Meet	Saskatoon	2	Mar.						*						*		50
X-Country Ski (Disabled)	Saskatoon	1	Jan.						*						*		80
X-Country Ski "Sask. 60"	Saskatoon	1	Feb.						*					*			900
Speed Skate (Ind. Chp.)	Saskatoon	2	Mar.						*					*			150
Heritage Bus Tours	Saskatoon	-	Jul-Aug.								*		*				690
Mexabition	Saskatoon	5	Nov.								*		*				50,000
TOTAL BRIDGE CITY	20			3	4		1	3	7		2		2	5	12	1	288,145
REGION: (QUEEN CITY) REGINA																	
Wasklmo	Regina	1	Jan.	*												*	10,000
Reg. Folk Fest	Regina	3	May	*									*				1,000
Downtowner's Band Fest	Regina	4	Mar.	*									*				4,000
Intern. March Bands	Regina	1	May	*								*					6,000
Bazart	Regina	:	Jun.		*										*		10,000
BOMA	Regina	2	Aug.		*											*	1,000
Wintergreen	Regina	2	Nov.		*											*	—
Mosaic	Regina	3	May	*										*			25,000

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: (QUEEN CITY) REGINA (Continued)																	
Buffalo Days	Regina	7	Aug.				*								*		300,000
Agribition Rodeo	Regina	4	Nov.					*				*					20,000
Free Sky Ski	Regina	4	Feb.						*							*	50
Speed Skate (Otd. Chp.)	Regina	2	Jan.						*					*			240
Speed Skate (Ind. Chp.)	Regina	2	Mar.						*					*			150
Trial of Louis Riel	Regina	58	Jun-Aug.								*		*				5,000
Pile-of-Bones Day	Regina	1	Jul.								*					*	70,000
Western Canadian Farm Progress Show	Regina	1	Jun.								*		*				45,000
Sask. Bus./Ind. Show	Regina	2	Jun.								*	*					—
Cdn. Western Agribition	Regina	7	Nov.								*	*					150,000
TOTAL QUEEN CITY	18			5	3		1	1	3		5	4	4	3	2	5	647,440
REGION: (FRONTIER VISTA)																	
Folkloric	Moose Jaw	1	Sep.	*												*	500
Band Festival	Moose Jaw	4	May	*								*					26,000
Hobby Show	Moose Jaw	2	Mar.		*										*		4,000
Antique Auto Meet	Moose Jaw	2	Mar.		*										*		2,500
Parkhart	Moose Jaw	1	Jun.		*											*	1,000
Fair	Moose Jaw	2	Jul.				*								*		25,000
Indoor Rodeo	Moose Jaw	3	Apr.					*							*		3,000
Rodeo	Moose Jaw	3	May					*							*		3,000
Quarter Horse Show	Moose Jaw	3	Apr.					*							*		3,000
English Horse Show	Moose Jaw	13	Apr.					*							*		3,000
Harness Racing	Moose Jaw	9	Jul.					*							*		20,000
Quarter Horse & & Appaloosa Show	Moose Jaw	4	Jan.					*							*		2,000
Quarter Horse & Appaloosa Race	Moose Jaw	1	Jan.			*									*		3,000
Figure Skate (Chp. Juv.)	Moose Jaw	4	Jan.						*					*			240
Short-Line Railway	Moose Jaw	3	Jun.							*					*		—
Armed Forces Day - Air Show	Moose Jaw	1	Jul.								*	*					30,000-100,000
Cactus Hill Music Jamb.	M.J. Area	4	Jul.								*			*			15,000
TOTAL MOOSE JAW	17			2	3		1	7	1	1	2	2		2	11	2	141,240-211,240

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: (FRONTIER VISTA) (Continued)																	
Folk Lorama	Swift Curr.	1	May	*											*		3,800
Old Tyme Fiddlin' Champ.	Swift Curr.	4	Sep.	*									*				1,500
Frontier Days	Swift Curr.	4	Jun.				*								*		25,000
Rodeo (Indoor)	Swift Curr.	3	May.					*							*		9,000
Rodeo (Outdoor)	Swift Curr.	3	Jun.					*							*		10,000
Labatts Tankard (Cttg.)	Swift Curr.	5	Feb.						*					*			1,000
Childrens Soap Box Derby	Swift Curr.	1	Jul.							*					*		1,000
TOTAL SWIFT CURRENT	7			2			1	2	1	1			1	1	5		51,300
Folk Fest	Tugaske	1	June.	*												*	200
Goose Fest Days	Kindersley	5	Sept.	*											*		8,000
Gull Lake Fair	Gull Lake	2	Jul.				*								*		—
Sports Day/Fair	Lumsden	5	Jul.				*									*	2,000
Fair	C. Butte	2	Jul.				*					*				*	500
Rodeo	Major	2	May					*							*		1,500
Rodeo	Maple Creek	2	May					*						*			4,000
Rodeo	Lancer	2	Jun.					*							*		3,000
Rodeo	Brock	2	Jun.					*							*		2,000
Rodeo	Assiniboia	2	Jun.					*							*		5,000
Rodeo	Outlook	2	Jun.					*							*		2,000
Rodeo	Mankota	2	Jun.					*							*		2,000
Rodeo	Loverna	2	Jun.					*							*		2,000
Rodeo	Elrose	2	Jul.					*							*		2,000
Rodeo	Shaunavon	3	Jul.					*							*		2,000
Rodeo	Beechy	3	Jul.					*							*		3,000
Rodeo	Eastview	2	Jul.					*							*		3,000
Rodeo	Kyle	2	Aug.					*							*		2,500
Rodeo	Dundurn	2	Aug.					*							*		2,000
Rodeo	Val Marie	2	Aug.					*							*		2,000
Rodeo	Cadillac	3	Sep.					*							*		3,000

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: (FRONTIER VISTA) (Continued)																	
Rodeo	McCord	3	Oct.					*							*		—
Rodeo	Bengough	2	Jul.					*							*		2,000
Rodeo	Rouleau	2	Jul.					*							*		1,000
Horse Show/Race	Bengough	1	Jul.					*							*		—
Alpine Downhill Ski	Buffalo Pd.	2	Feb.						*					*			175
Big Muddy Trail Ride	Big Muddy	1	Jul.						*						*		100
Golfer Derby	Eston	2	Jul.							*					*		—
TOTAL	28			2	0	0	3	20	2	1	0	0	0	2	22	4	54,975
TOTAL FRONTIER VISTA	52			6	3	0	5	29	4	3	2	2	1	5	38	6	247,515-317,515
REGION: PRAIRIE VALLEYS																	
Bathtub Races	Regina B.	1	Jul.								*				*		—
Rodeo	Davidson	2	Jun.					*							*		3,000
Rodeo	Craven	1	Aug.					*						*			30,000
Fair	Estevan	3.5	Jul.				*								*		11,000
Minot-Regina Snowmobile Race	Estevan	2	Feb.						*						*		300
The Great Race	Estevan	1	Sep.							*					*		—
Crocus Craft Fair	Weyburn	1	Jun.		*											*	200
Fair	Weyburn	3	Jul.				*								*		11,000
Rodeo	Weyburn	3	Aug.					*							*		7,000
X-Country Ski	Weyburn	1	Mar.						*						*		250
Artisan/Sale	Lebret	2	Jul.		*											*	300
Pow-Wow (Indoor)	Broadview	2	Apr.			*									*		600
Curling Championship	Davidson	4	Feb.						*						*		400

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: PRAIRIE VALLEYS (Continued)																	
Pow Wow (Outdoor)	Carlyle	2	Jun.			*							*				—
Pow Wow (Outdoor)	Grenfell	2	Jun.			*						*					5,000
Pow Wow (Outdoor)	Fort Qu'Ap.	3	Aug.			*							*				—
Rodeo	Radville	2	Aug.					*							*		3,000
Rodeo	Wood Mtn.	2	Jul.					*					*				4,000
Rodeo	Kennedy	2	Jul.					*							*		2,000
Rodeo	Montmartre	3	Sep.					*							*		3,000
Rodeo	Wapella	2	Oct.					*							*		2,500
Alpine Ski	Fort Qu'Ap.	2	Jan.						*					*			175
Disabled Ski	Fort Qu'Ap.	1	Jan.						*						*		80
Curling (Finals)	Carlyle	4	Feb.						*					*			375
Bed Derby	Balgonie	1	Jun.							*						*	—
Tractor Pull	Moosomin	2	Jul.							*				*			7,000
TOTAL PRAIRIE VALLEYS	26			0	2	4	2	8	6	3	1	1	3	4	15	3	91,180
REGION: WOODLAND PARK																	
Winterfest	P.A.	8	Jan.	*											*		8,000
Canada Day	P.A.	1	Jul.								*					*	5,000
Evergreen	P.A.	1	Nov.		*										*		—
Tapistrama	P.A.	2	Oct.	*											*		1,000
Founder's Day	P.A.	3	Jul.				*								*		—
Fair	P.A.	7	Aug.				*								*		25,000
Rodeo	P.A.	2	Jun.					*							*		5,000
Arts/Crafts Show	Yorkton	1	Sep.		*											*	2,000
Thresherman's Show	Yorkton	2	Aug.								*				*		—
Golden Sheaf Awards	Yorkton	5	Nov.		*									*			—
Film/Video Competition	Yorkton	5	Jun.		*								*				100
Rodeo Fair	Yorkton	4	Jul.					*							*		25,000
Arabian Horse Show	Yorkton	2	Jun.					*							*		5,000
Quarter Horse Show	Yorkton	1	Jun.					*							*		200
Cross Country Ski	Yorkton	1	Feb.						*						*		100
Precision Skate	Yorkton	1	Feb.						*					*			240
Figure Skate Champ.	Yorkton	5	Mar.						*					*			1,000

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: WOODLAND PARK (Continued)																	
Winterfest	Canora	5	Jan.	*											*		1,500
Folkfest	Melville	1	Apr.	*											*		400
Heritage Intern.	Kamsack	1	May.	*												*	900
Dance '83	Melville	1	May.	*											*		500
Fiddle Contest	Carrot Rvr.	2	Jul.	*									*				1,000
Longshadows Art Show	Humboldt	2	Nov.		*										*		—
Pow-Wow	Quinton	3	Jul.			*							*				800
Pow-Wow	Norquay	2	Aug.			*							*				—
Pow-Wow	Cupar	3	Aug.			*							*				6,000
June Daze	Canora	3	Jun.				*								*		—
Fair	Wynyard	2	Jun.				*								*		—
Fair	Wadena	2	Jun.				*								*		—
Fair	Beatty	2	Jul.				*								*		1,000
Fair	Humboldt	3	Jul.				*								*		20,000
Fair	Melfort	4	Jul.				*								*		10,000
Fair	Langenburg	3	Jul.				*								*		—
Rodeo	Lanigan	2	Jun.					*							*		2,000
Rodeo	Wadena	2	Jun.					*							*		2,000
Rodeo	Davidson	2	Jun.					*							*		2,000
Rodeo	Kinistino	3	Jul.					*							*		3,000
Rodeo	Sturgis	1	Jul.					*							*		500
Rodeo	Nipawin	4	Aug.					*							*		13,000
Rodeo	Humboldt	3	Sep.					*							*		6,000
Royal Lip. Stallions	Humboldt	1	Aug.					*							*		2,000
Ski Tour	Humboldt	1	Aug.						*						*		100
Cross Country Ski	Kamsack	1	Mar.						*						*		100
Curling - Men's Final	Melville	4	Feb.						*					*			800
Curling - Laurie Artiss	Foam Lake	4	Feb.						*						*		125
Curling - Final	Lanigan	3	Mar.						*						*		150
Sports Day	Kamsack	1	May						*						*		—

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: WOODLAND PARK (Continued)																	
Highland Games	Saltcoats	1	Jun.						*						*		—
Fish Derby	Nipawin	-	May						*						*		—
Bicycle Tour	Duck Mtn.	1	Aug.						*							*	—
Chicken Chariot Races	Wynyard	1	Jun.							*					*		50
TOTAL WOODLAND PARK	51			7	5	3	9	12	12	1	2	0	5	4	37	5	151,565
REGION: HERITAGE TRAIL																	
Saskatchewan Handcrafts Show/Sale	Battleford	2	Jul.		*									*			22,000
Snowflake	Battleford	3	Nov.		*									*			—
Fair	N. Btlfd.	6	Jul.				*								*		27,000
Rodeo (Indoor)	N. Btlfd.	3	Apr.					*							*		3,000
Down Hill Ski	Battleford	2	Jan.						*					*			175
Down Hill Ski	Battleford	2	Mar.						*					*			175
Western Dev. Mus. Days	N. Btlfd.	2	Jun.								*			*			—
Those Were the Days	N. Btlfd.	2	Aug.								*			*			2,600
Winter Festival	Meadow Lake	3	Mar.	*											*		3,000
Folkfest	Redberry	1	Aug.	*											*		3,000
Metis Heritage Days	Batoche	2	Jul.			*							*				5,000
Fair	Riddell	3	Jun.				*								*		—
Rodeo	Lloydmstr.	2	Apr.					*							*		3,000
Rodeo	Pearceland	-	Apr.					*							*		—
Rodeo	Alsask.	2	Jun.					*							*		3,000
Rodeo	Unity	2	Jun.					*							*		2,000
Rodeo	Big River	2	Jun.					*							*		3,000
Rodeo	Meadow Lake	4	Jun.					*							*		—
Rodeo	Shellbrook	3	Jul.					*							*		3,000
Rodeo	Spiritwood	2	Jun.					*							*		2,000
Rodeo	Langham	3	Jun.					*							*		3,000
Rodeo	Kerrobert	2	Jul.					*							*		2,000
Rodeo	Loon Lake	2	Oct.					*							*		2,000
Fair	Lidmstr.	4	Jul.				*								*		30,000

SUMMARY OF EVENTS BY REGION

EVENT	LOCATION	SEASON DURATION		TYPE								SIGNIFICANCE					ATTNDNCE
		Dur.	Mon.	FESTIVALS	ARTS/CRAFTS	NATIVE	FAIRS	RODEOS	SPORTS	NOVELTY	THEMED	INTERNTL.	NATIONAL	PROVINCIAL	REGIONAL	LOCAL	
REGION: HERITAGE TRAIL (Continued)																	
Down Hill Ski	Domreny	2	Feb.						*					*			175
Cross Country Ski	Meadow Lake	1	Feb.						*						*		100
Curling - Men's Final	Meadow Lake	1	May						*					*			800
Ball Tournament	Maymont	1	May						*						*		—
Canoe Race	N. Btlfd.	1	Jun.						*						*		1,000
TOTAL HERITAGE TRAIL	29			2	2	1	3	12	7	0	2	0	1	8	20	0	121,025
REGION: NORTHERN SASKATCHEWAN																	
Winter Carnival	La Ronge	4	Mar.	*											*		3,000
Water Front Festival	La Ronge	1	Jul.	*											*		—
SASKALOPPET	La Ronge.	1	Mar.						*						*		—
TOTAL NORTHERN SASK.	3			2					1						3		3,000